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ABSTRACT

This supplement to the California Business Education Program Guide for Office and Distributive Occupations is designed to assist office education teachers of secondary, postsecondary, and adult students to update their business education curricula in light of new technology and increasing demand for skilled office workers. Focusing on the legal secretary, the guide is comprised of thirteen competency modules. Module topics include (1) legal terminology, (2) specialized typing techniques, (3) dictation and transcription, (4) legal forms and documents, (5) filing, (6) client contact, (7) legal ethics, (8) calendaring, (9) recordkeeping and banking, (10) mail, (11) office maintenance, (12) employability, and (13) career development. The first pages of each module contain performance objectives which indicate to the instructor and student what can be taught/learned to meet entry-level legal secretarial occupational standards. Following the list of performance objectives in each module are possible instructional strategies, pre/post tests, and possible instructional materials. A cross-reference section is included which outlines the main interrelationships between modules. The California Business Education Program Guide for Office and Distributive Occupations along with common core units of instruction are also available--see note. (LRA)

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AL S AL SUPPLEMENT

NIA BUSINESS EDUCATION PROGRAM GUIDE

PREFACE

The Legal Secretarial Supplement is a competency-based instructional program guide for identified entry-level Legal Secretarial occupations. It was designed as a component of the Business Education Program Model and is a supplement to the *California Business Education Program Guide for Office and Distributive Occupations*. The procedures utilized in the development and validation of the Legal Secretarial Supplement parallel those of the original effort.

The Supplement was designed for use in secondary education, adult education, Regional Occupational Program, and community college classroom teaching situations. To ensure its usability at each programmatic level, care was taken that members of the Task Force who developed the guide represented each of these groups and that additional readers would also reflect the variety of programs throughout the State of California. As a result, the guide can be used in a variety of ways according to the preference of the instructor or the business department. Any of the following strategies might be appropriate:

1. Insert selected competency modules at appropriate points in the existing program.
2. Redesign the existing textbook-centered program to emphasize the development of the required competencies.
3. Develop the instructional program around the competency modules required for employment and identified entry-level word processing occupations, with the textbook serving only as a resource instrument.

This document was produced by Ira Nelken & Associates, Inc. of Chico and Planning Associates of Merced under contract to the California State Department of Education, Business Education Component of the Vocational Education Unit, and the California Community Colleges Chancellor's Office. This guide was made possible only through the efforts of a group of California educators and representatives of industry who gave of their time and talent to develop the contents and/or review the draft. Those to whom this guide should be attributed include the following:

Dr. Alice L. Holst
Vintage High School
Napa Unified School District
Napa

Jenny Shelly
College of the Sequoias
Visalia

Pat Duschka
Regional Occupational Program
Sacramento City Unified School District
Sacramento

Ila Nehre
Vintage High School
Napa Unified School District
Napa

Stephanie Twomey
President
Planning Associates
Merced

The work of the Task Force was based on employment data derived from a variety of sources. We would like to extend a special thanks to the various employers, managers, and front-line supervisors who assisted us in identifying the basic competencies they expected for entry-level Legal Secretarial employees. They included the following:

Doris Arbuckle, Office Manager
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Chico

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Peters, Fuller, Rush, Schooling & Luvaas
Chico

Julie Anderson, Legal Secretary
Eugene Rambic Law Firm
Los Angeles

Linda Stackhouse, Legal Secretary and President
of Butte County Legal Secretaries Association
Chico

Ann Kelley, Law Clerk
Allen, Ivey, Cornell, Mason, & Castellucci
Merced

Doris Laughlin, Office Manager
Lauglin & Christensen
Chico

Pat Perkins, Legal Secretary and Office Manager
Levereny & Ward
Chico

Linda Colby, Legal Secretary
Mulkey, Aisthrope, Kelly & Cook
Chico

In addition to the task analysis completed by project staff, a second level of analysis was performed by Dr. Alice L. Holst's Legal Secretarial Practice class at Vintage High School in the Napa Unified School District. For the last twelve years (1968-1980), Dr. Holst's students have been placed in legal offices for work experience during which each student completes a form each week detailing the kinds of tasks performed at the work site. Dr. Holst's class of 1979-80 analyzed the results of twelve years of work experience in 24 legal offices in the Napa area and further validated the task analysis performed by project staff.

Acknowledgements

The project staff is grateful to many individuals who made this supplement a reality. In particular, special thanks are extended to:

Mr. Gary Thompson for guidance and direction
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Ira Nelken, Ed.D., President
Ira Nelken & Associates, Inc.

Stephanie C. Twomey, President
Planning Associates

June, 1980

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LEGAL SECRETARIAL SUPPLEMENT
CALIFORNIA BUSINESS EDUCATION PROGRAM GUIDE
FOR OFFICE AND DISTRIBUTIVE OCCUPATIONS

Purpose

This supplement was developed to assist office education teachers of secondary, adult education, Regional Occupational Program, and community college students to update their business education curricula in light of new technology and increasing demand for skilled office workers. By 1990 the U.S. economy will generate nearly 20 million new jobs. Well over half will be in white-collar occupations--professional and technical workers, managers, and sales and clerical workers--according to estimates of the Bureau of Labor Statistics of the U.S. Department of Labor. The projections are part of the Bureau's biennial occupational outlook program.

Clerical workers--including bank tellers, bookkeepers, cashiers, secretaries, and typists--constitute the largest and fastest growing white-collar group. Between 1978 (the year on which the projections are based) and 1990, employment growth in these occupations is expected to generate 4.8 million jobs. Significant employment growth is anticipated for secretaries, typists, and receptionists. The chart below* indicates the projected rate of growth for selected clerical jobs from 1972 to 1985. The growth rates are expected to remain as high or higher to 1990.

Job Title	Estimated Employment 1972	Projected Requirements 1985	Percent Growth 1972-1985
Cashiers	998,000	1,360,000	36.1
File Clerks	272,000	318,000	16.7
Office Machine Operators	195,000	230,000	17.9
Receptionists	436,000	650,000	50.0
Statistical Clerks	299,000	375,000	25.8
Stock Clerks	511,000	750,000	46.2
Typists	1,021,000	1,400,000	38.7

*Based on Bureau of Labor Statistics (Bulletin 1824, 1974)

These figures are representative of trends nationwide and throughout all industries.

The reasons for the high demand for skilled office workers are basic: the office worker is needed in every community, large or small, and in every type of activity; the population is growing; more information from more sources is being collected from more places; the government is requiring greater reporting; more complex business operations require more data inputs for decision making; and more diversification within companies requires more data compilations and more communications with branches in other sections of the country. New developments in computers, office machines, and dictating equipment will greatly affect employment in many occupations within this group.

In response to this emerging occupational opportunity, the California State Department of Education and the California Community Colleges Chancellor's Office sponsored a contract to develop guidelines for a core Legal Secretarial training program to provide students with entry-level job competencies (skills, attitudes, and knowledges) compatible with the needs of employers. The supplement is based upon identifiable competencies, rather than upon traditional courses. The system for managing the program was designed so that the transition from courses to competency-based instruction can be made with relative ease by teachers who work in a variety of school settings. The guide includes student-oriented performance objectives, a number of optional approaches to instruction, pre/posttests, and possible instructional materials.

Rationale

The Legal Secretarial field was chosen because it represents an office occupations area with many new entry-level employment opportunities readily available to students completing office education programs, including high school graduates if properly trained. An investigation of both task-analysis studies and task analysis as reported by employers or front-line supervisors determined those competencies needed by entry-level Legal Secretaries in the performance of their work. Participating employers were duly noted in the Preface to this guide. The major studies to which the project team referred in the course of their work included:

Crawford, Lucy - A Competency Pattern Approach to Curriculum Construction in Distributive Teacher Education; (ED 032 382 -- ED 032 911) Virginia Polytechnic Institute and State University, Blackburg, Virginia.

Davis, Gene and Smith, Art - Cooperative Occupational Survey -- Skills Identified with the Clerical and Sales Job Fields; Riverside, California.

Erickson, Lawrence W. - Basic Components of Office Work -- An Analysis of 300 Office Jobs; University of California, Los Angeles.

Kallaus, Norman F. - Hiring Standards and Job Opportunities for Beginning Office Workers; University of Iowa, Iowa City, Iowa.

Perkins, Edward et al. - Clusters of Tasks Associated with the Performance of Major Types of Office Work; Washington State University, Pullman, Washington.

Many of the comptencies contained in this guide can be expanded and used for a wide variety of office occupations by using appropriate illustrative examples for most of the following office occupations. These office occupations, as determined by the Department of Labor in its Dictionary of Occupational Titles (DOT) are:

201.362-010	Legal Secretary
201.362-030	Secretary
202.362-014	Stenographer
214.482-010	Billing-Machine Operator
216.362-030	Probate Clerk
202.362-010	Shorthand Reporter (court reporter)
243.362-010	Court Clerk
250.257-010	Sales Agent, Insurance
250.357-014	Leasing Agent, Resident
250.357-018	Sales Agent, Real Estate
251.157-010	Sales Agent, Securities
251.237.014	Sales Agent, Financial-Report Service
119.267-026	Paralegal Assistant
119.287-010	Title Examiner
169.167-014	Administrative Secretary
169.167-034	Manager, Office
169.167-058	Underwriter (insurance)
186.167-010	Estate Planner (insurance)
203.382-022	Mortgage-Processing Clerk
209.262-010	Correspondence Clerk
209.367-046	Title Searcher (real estate)
219.362-046	Real Estate Clerk

Procedures

Using data obtained from industry and the literature, the project team assembled a Task Force composed of instructors from all the levels of education concerned with the supplement, as well as members of industry. The Task Force prepared minimum performance objectives and a sequence of suggested instructional strategies for each of the thirteen identified competency modules. In addition, available educational resources were searched, such as the Educational Research Information Center and the Business Education Data Dissemination System (BEDDS), in an attempt to identify additional instructional strategies that would develop requisite competencies.

Limitations

This supplement addresses only the Legal Secretarial occupations and concerns itself only with need-to-know, entry-level skills, attitudes, and knowledges. It is simply a guide, not a complete curriculum. It is fully recognized that these competencies do not encompass a complete business education program. Further, for obvious reasons, we were unable to include all the many materials available in the field for use in an effective Legal Secretarial course, nor was there any attempt to identify and list all the possible objectives and strategies which a teacher could use for Legal Secretarial instruction. We do hope, however, that the guide represents a useful outline to the instructor who is either initiating a Legal Secretarial program for the first time, revising a program in light of the current state-of-the-art of the industry, or simply needing to measure course content with what other practitioners feel is important in such a course. Given the continuous changes in the Legal Secretarial field, we acknowledge that this supplement will probably need revision within the next five years, but we trust that within that period of time, the document will be of major assistance to teachers of future Legal Secretaries.

Program Model

The program model on the following page provides an overview of the California Business Education Program Guide for Office and Distributive Occupations and its supplements. It shows that competencies common to both distributive and office entry-level occupations have been identified. This concept is significant because it provides a foundation for job flexibility. The office core competencies are those which were identified as being common to eight selected office jobs: general office clerk, typist, stenographer, accounting clerk, banking/finance clerk, medical secretary, and legal secretary. The distributive core competencies are those which were identified as being common to four selected distributive jobs: checker-cashier, salesperson general, service station attendant, and waiter-waitress. The reader will note that the banking/finance clerk shares competencies from both the distributive core and the office core.

Suggested Prerequisite Competencies to Legal Secretarial Modules

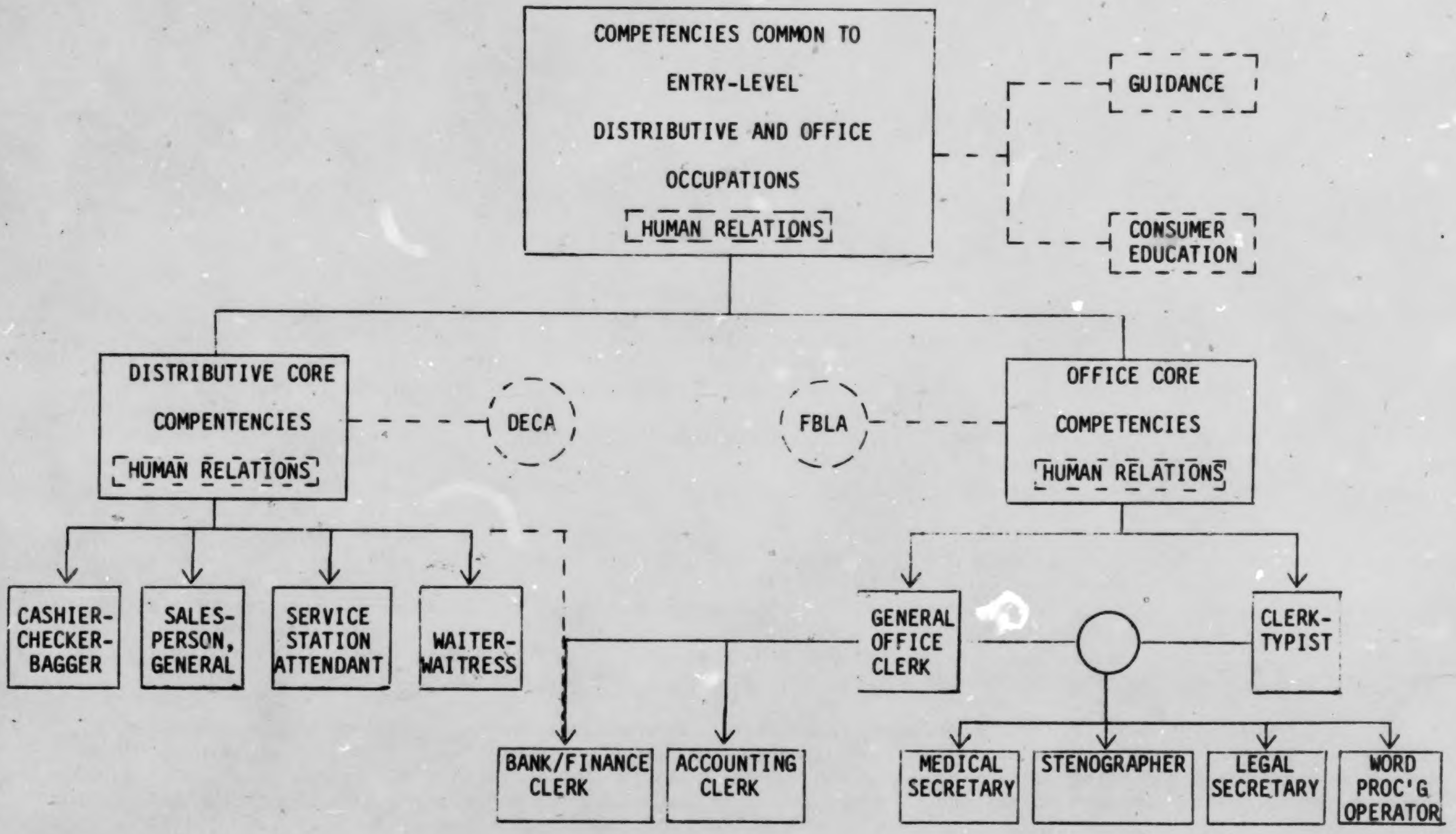
Although the instructor is likely to have students with widely discrepant backgrounds and can probably assume little except typing, the following competencies are suggested prerequisites to this supplement. They are contained in the CBEP Guide, and it will be helpful if students have already completed these competencies. Alternatively, the instructor may wish to draw on these before teaching the various modules contained in this supplement.

Common Core Competencies:
  104.00.00 Handwriting
  106.00.00 Job Application
  113.00.00 Spelling
  114.00.00 Telephone
  115.00.00 Working with People
  116.00.00 Written Communication (Part 1 of two-part sequence. Part 2 is 208.00.00)

Office Core Competencies:
  201.00.00 Duplicating
  202.00.00 Filing and Retrieving (Part 1 of two-part sequence. Part 1 is 302.00.00)
  203.00.00 Mail--Incoming and Outgoing
  204.00.00 Petty Cash
  205.00.00 Spelling
  206.00.00 Typing
  207.00.00 Working with People
  208.00.00 Written Communication (an extension of 116.00.00)

General Office Clerk Competencies:
  302.00.00 Filing and Retrieving
  303.00.00 Mail--Incoming and Outgoing

PROGRAM MODEL FOR OFFICE AND DISTRIBUTIVE OCCUPATIONS



How To Use This Guide

There are thirteen competency modules in the Legal Secretarial Supplement. Those competencies which the Task Force considered most important for Legal Secretarial training will be found first. It is surely not the intent of this guide to tell office occupation educators what to teach or how to teach it. By structuring the supplement in this manner, however, the Task Force hoped to provide maximum assistance to the instructor just beginning to implement a Legal Secretarial course and possibly unsure of content, or to the instructor forced to abbreviate course content into one semester or less. This supplement also includes performance objectives which indicate to the instructor and student what can be taught/learned to meet entry-level Legal Secretarial occupational standards.

The supplement was developed with all classroom circumstances in mind and should be read carefully and completely. It can then be checked with present instructional materials and units. Standard texts, LAPS, and other instructional materials can be used to teach the competencies, but the instructor needs to review them to see exactly which critical competencies each covers. Adding new CBEP instructional units and performance objectives to cover the competencies that need to be taught/learned is mainly a case of deciding on instructional materials and methods. Many of the CBEP performance objectives are written so that with little or no modification they can be taught in common, small group, and/or individualized settings.

The first pages of each of the thirteen modules contain the performance objectives--condition, performance, and standard for each. Generally, one objective logically follows another. However, some of the objectives are independent and have been placed in the most logical and meaningful spot. Each objective is important and necessary.

Following the list of performance objectives in each module are possible instructional strategies for those objectives. In some instances, one or more objectives in one competency module can best be taught and learned with objectives from another module. You may find in some cases that an objective in one module is nearly identical to an objective in another module. The Cross-Reference section below outlines the main interrelationships between modules.

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Finally, the performance objectives can serve a variety of useful purposes in the instructional program. The performance objectives can be used as guides for students, for example. They can be reproduced, given to students to identify exactly what is to be learned, and then used as a check list. If the instructional situation involves a cooperative or work experience program or a community classroom/lab training station, managers may also be given an abbreviated check list of the objectives so they, too, are aware of their trainees' related instructional programs and can assist in specific training.

The performance objectives are particularly useful as competency-based exams. By developing tests based on the objectives covered in a unit of instruction, the instructor can prove that the unit taught what students needed to know and do, and the students can prove they have gained the required knowledge, skills, and attitudes.

The competency modules, or individual performance objectives within them, can be the basis for a Certificate of Competency that lists exactly what each student has been able to perform at job standard. Certificates of Competency are very helpful to graduates seeking employment and are useful for informing the business community of the qualifications young people can gain through a comprehensive Office Education program.

Cross-Reference of Objectives/Competencies in the Legal Secretarial Supplement

Some competency modules almost demand to be taught with other competency modules. Many performance objectives from one module relate directly to performance objectives from others. The chart below is not exhaustive, but can be used to find related modules.

MODULE	SUBJECT	RELATED PERFORMANCE OBJECTIVES CAN BE FOUND IN:
Legal Terminology	Evolution and Exactitude of Legal Terminology	• Specialized Typing Techniques • Dictation and Transcription • Legal Forms and Documents • Client Contact • Student Employability • Career Development/Awareness
	Proper Pronunciation of Legal Terms	• Specialized Typing Techniques • Dictation and Transcription • Legal Forms and Documents • Client Contact • Student Employability • Career Development/Awareness
	Meanings of Legal Terms	• Specialized Typing Techniques • Dictation and Transcription • Legal Forms and Documents • Client Contact • Student Employability • Career Development/Awareness
Specialized Typing Techniques	Proper Elements of Legal Style	• Dictation and Transcription • Legal Forms and Documents • Student Employability
	Techniques for Printed Forms	• Dictation and Transcription • Legal Forms and Documents • Student Employability
	Techniques for Completely Typed Documents	• Dictation and Transcription • Legal Forms and Documents • Student Employability
	Miscellaneous Items	• Dictation and Transcription • Student Employability

MODULE	SUBJECT	RELATED PERFORMANCE OBJECTIVES CAN BE FOUND IN:
	Carbon Copies	• Dictation and Transcription • Legal Forms and Documents • Student Employability
	Clean Erasing	• Dictation and Transcription • Legal Forms and Documents • Student Employability
	Z-Rulings	• Dictation and Transcription • Legal Forms and Documents • Student Employability
	Back-Feeding of Stapled Material	• Dictation and Transcription • Legal Forms and Documents • Student Employability
	Legal Resources and References	• Dictation and Transcription • Legal Forms and Documents • Student Employability
	Proofreading of Typed Copy	• Dictation and Transcription • Legal Forms and Documents • Student Employability
	Assembling and Binding of Legal Documents	• Dictation and Transcription • Legal Forms and Documents • Student Employability
Dictation and Transcription	Dictation by Shorthand and/or Machine	• Specialized Typing Techniques • Legal Forms and Documents
	Transcription from Shorthand and/or Machine	• Specialized Typing Techniques • Legal Forms and Documents

MODULE	SUBJECT	RELATED PERFORMANCE OBJECTIVES CAN BE FOUND IN:
	Use of a Variety of Typewriters	• Office Maintenance and Peripheral Skills
	Letters, Memos, Envelopes, Etc.	• Specialized Typing Techniques
	Proofreading of Typed Copy	• Specialized Typing Techniques • Legal Forms and Documents • Student Employability • Career Development/Awareness
	Word Processing	• Specialized Typing Techniques • Legal Forms and Documents • Student Employability • Career Development/Awareness
Legal Forms and Documents	California Court System	• Client Contact • Legal Ethics • Calendaring • Student Employability • Career Development/Awareness
	Federal Court System	• Client Contact • Legal Ethics • Calendaring • Student Employability • Career Development/Awareness
	Typing of Noncourt and Court Documents	• Client Contact • Legal Ethics • Calendaring • Student Employability • Career Development/Awareness
	Recording of Documents	• Client Contact • Legal Ethics • Calendaring • Student Employability • Career Development/Awareness

MODULE	SUBJECT	RELATED PERFORMANCE OBJECTIVES CAN BE FOUND IN:
Filing	Client Files	• Client Contact • Legal Ethics • Calendaring
	Cross-Reference Index Card File	• Client Contact • Legal Ethics • Calendaring
	New Client Files and Accounting Cards	• Client Contact • Legal Ethics • Calendaring
	Case Folders	• Client Contact • Legal Ethics • Calendaring
	Tickler File	• Calendaring • Office Maintenance and Peripheral Skills
	Financial and Office Maintenance Files	• Recordkeeping and Banking • Office Maintenance and Peripheral Skills
	Reorganizing of Files	• Office Maintenance and Peripheral Skills
	New Pages to Be Inserted in Law Books	• Office Maintenance and Peripheral Skills • Legal Terminology
Client Contact	Answering the Telephone	• Legal Ethics • Student Employability
	Taking Messages	• Legal Ethics • Student Employability
	Screening Telephone Calls for the Attorney	• Legal Ethics • Student Employability

MODULE	SUBJECT	RELATED PERFORMANCE OBJECTIVES CAN BE FOUND IN:
	Making Appointments	• Calendaring • Legal Ethics
	Cancelling Appointments	• Calendaring • Legal Ethics
	Greeting Clients	• Legal Ethics • Student Employability • Career Development/Awareness
	Operating the Telephone Switchboard	• Legal Ethics
Legal Ethics	Confidentiality	• Specialized Typing Techniques • Dictation and Transcription • Legal Forms and Documents • Client Contact • Student Employability • Career Development/Awareness
	Appropriate Responses to Situations Involving Legal Ethics	• Specialized Typing Techniques • Dictation and Transcription • Legal Forms and Documents • Client Contact • Student Employability • Career Development/Awareness
Calendaring	Scheduling Appointments on Office Calendar and Cross-Checking with Attorney's Calendar and Central Office Calendar	• Client Contact • Legal Ethics

MODULE	SUBJECT	RELATED PERFORMANCE OBJECTIVES CAN BE FOUND IN:
	Arranging Meetings, Conferences, and Business Trips	● Client Contact ● Legal Ethics
	Preparing for a Day's Appointments	● Student Employability
Recordkeeping and Banking	Client Time Records	● Client Contact ● Calendaring
	Posting Time to Client Records	● Client Contact ● Calendaring
	Client Statements	● Client Contact ● Filing ● Calendaring
	Payment Records	● Filing
	Bank Deposits	● Filing
	General Ledger	● Office Maintenance and Peripheral Skills ● Student Employability
	Overdue Statements and Bad Checks	● Client Contact ● Legal Ethics
Mail	Stuffing and Stamping Envelopes	● Recordkeeping and Banking ● Office aintenance and Peripheral Skills
	Sorting Mail	● Legal Forms and Documents ● Recordkeeping and Banking ● Office Maintenance and Peripheral Skills
	Metering Mail	● Legal Forms and Documents ● Recordkeeping and Banking ● Office Maintenance and Peripheral Skills

MODULE	SUBJECT	RELATED PERFORMANCE OBJECTIVES CAN BE FOUND IN:
	Certifying Mail	● Legal Forms and Documents ● Calendaring
	Using Postal Service or Personal Delivery	● Legal Forms and Documents ● Calendaring
	Using Telegrams and Cables	o Legal Forms and Documents ● Calendaring
	Obtaining Proper Signatures on Outgoing Mail	● Specialized Typing Techniques ● Legal Forms and Documents ● Dictation and Transcription
	Opening and Logging Mail	● Legal Ethics
	Prioritizing Mail	● Office Maintenance and Peripheral Skills
Office Maintenance and Peripheral Skills	Caring for Office Equipment	● Dictation and Transcription
	Using the Copier	● Specialized Typing Techniques ● Legal Forms and Documents ● Dictation and Transcription
	Stapling and Punching Papers	● Specialized Typing Techniques ● Legal Forms and Documents ● Dictation and Transcription
	Controlling Inventory	● Filing
	Performing General Housekeeping	● Student Employability
	Maintaining Office Security	● Student Employability

MODULE	SUBJECT	RELATED PERFORMANCE OBJECTIVES CAN BE FOUND IN:
Student Employability	Entry-Level Career Opportunities	• Career Development/Awareness
	Salable Resumes	• Career Development/Awareness
	Student Portfolios	• Specialized Typing Techniques • Legal Forms and Documents • Dictation and Transcription
	Legal Secretarial Position Interviews	• Specialized Typing Techniques • Legal Forms and Documents • Dictation and Transcription
	Professional Appearance, Poise, Attitude, and Common Sense	• Client Contact • Legal Forms and Documents
	Time Management and Working Under Pressure	• Client Contact • Calendaring
	Employee Performance Reviews	• Career Development/Awareness
	How to Leave a Job	• Career Development/Awareness
Career Development/ Awareness	Career Paths in the Legal Field	• Student Employability
	Career Possibilities in Related Fields	• Client Contact • Student Employability

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NUMERICAL SYSTEM

A system has been devised to identify the components of the competency modules included in the program guide. Following is an explanation of the numerical system.

Code			Identifies
000			Program Level
			Competency Module
	.01		Performance Objective
		.00	Objective Number
	.02		Instructional Ideas
	.03		Pretest
	.04		Posttest
	.05		Learning Activity Materials

Example:

1201	.01	.01	
101			Legal Secretarial
			Legal Terminology
	.01		Performance Objectives
		.01	Evolution and Exactitude of Legal Terminology
	.02		Instructional Ideas
	.03		Pretest
	.04		Posttest
	.05		Learning Activity Materials

Number	Condition	Performance	Standard
1201.01.01	Given demonstration and discussion of the evolution of legal terminology, the reasons why it is difficult to learn, and the necessity for using it precisely,	the student will refer to this information when asked during the course of the instructional period	to the satisfaction of the instructor.
1201.01.02	Given written and verbal pronunciation exercises,	students will pronounce legal terminology correctly	to the satisfaction of the instructor.
1201.01.03	Given written and verbal exercises designed for learning the meanings of legal terms,	students will master each set of legal terminology	with 90% accuracy.

Number	Instructional Ideas
	GENERAL COMMENT: Legal terminology is probably most appropriately taught by introducing one or two lessons per week over the course of instruction. It is conceivable, however, that an instructor may wish to teach the entire module all at once and use the remaining instructional time to reinforce what was already taught/learned.
1201.02.01	Discussion and demonstration should center around the fact that legal terminology is not systematic, as is medical terminology, for example. The lawyer's language is a combination of archaic terminology and Latin expression. The instructor can demonstrate the uniqueness of legal terms by contrasting them with modern expressions. Instructors can have students trace the development of legal terms, using standard English dictionaries, to illustrate the genealogy of legal vocabulary. For example, attorneys persist in the myth of contracts "written under seal," which in fact they were hundreds of years ago.
1201.02.02	Students, including high school students, can master two legal lessons per week from the eleven modules contained in Business Education Data Dissemination System (BEDDS) on file at the State Department of Education. Instruct students to look up the pronunciation of legal terms and to write the terms in a manner which will help them remember (e.g., mens rea = "menz ray-a"). Introduce proper pronunciation as the lessons are assigned. Have students practice pronouncing the terms as a group during the week, more than once if possible. There is particular value in group pronunciation exercises, since there is some variation among dictionaries.
1201.02.03	A. Assign two legal lessons per week from the BEDDS resource. This is a series of 55 legal terminology lessons developed by Dr. Alice L. Holst, Vintage High School Legal Secretarial Practice Instructor (ret.), Napa Unified School District. Dr. Holst is the same person who developed the Medical Terminology text published by IBM and which the company reports is one of its fastest selling texts. B. Assign chapter summaries from legal textbooks and corresponding exercises in workbooks which usually contain legal terminology sections.

Number **Instructional Ideas**

GENERAL COMMENT:

The 55 legal terminology lessons developed by Dr. Holst were placed in BEDDS during the summer of 1980. The following are tests to accompany almost all those lessons. They have been divided between pretests and posttests for our convenience here. The same test can serve as either pre or posttest if there are students in the class who already know legal terminology. For most teaching situations, however, the students will not be sufficiently familiar with legal terminology to warrant a pretest. BEDD's resources can be obtained by using the Order Form on page 31. The instructor can request any or all of the eleven modules "Legal terminology for Legal Secretarial Training." See 1201.05.02, page 30, for BEDDS identification numbers for each module.

1201.03.01 Pretest Directions (Lessons 1-5): Write each legal term as your instructor dictates. After you have written all twenty terms, match the letter of the definition on the right with the correct term on the left. There is only one correct answer per term, and there are more definitions than terms.

_____ 1. (turpitude)
_____ 2. (extradition)
_____ 3. (laches)
_____ 4. (stare decisis)
_____ 5. (duress)
_____ 6. (in forma pauperis)
_____ 7. (accessory)
_____ 8. (interlocutory)
_____ 9. (ad infinitum)
_____ 10. (plaintiff)
_____ 11. (intestate)
_____ 12. (pendente lite)
_____ 13. (syllabus)
_____ 14. (cestui que trust)
_____ 15. (reversion)
_____ 16. (intervenor)
_____ 17. (causa mortis)
_____ 18. (domicile)
_____ 19. (res)
_____ 20. (eminent domain)

a. In its legal sense, everything done contrary to justice, honesty, modesty, or good morals.
b. The residue of an estate left by operation of law in the grantor or his/her heirs.
c. Anything which is joined to another thing as an ornament, or to render it more perfect.
d. The power to take private property for public use.
e. That place where an individual has his/her true, fixed, and permanent home and principal establishment.
f. In contemplation of approaching death.
g. A person who voluntarily interposes in an action or other proceeding with the leave of the court.
h. To abide by, or adhere to, decided cases.
i. Provisional; temporary; not final.
j. A person who brings an action; the party who complains or sues.
k. The surrender by one state to another of an individual accused or convicteed of an offense.
l. Unlawful constraint exercised upon an individual whereby s/he is forced to do some act that s/he otherwise would not have done.
m. Pending the suit; during the actual progress of a suit; during litigation.

Number **Instructional Ideas**

n. A thing; an object. As a term of law, this word has a very wide and extensive significance.
o. In the character or manner of a poor person.
p. Principally a question of inequity of permitting claim to be enforced.
q. Without limit; indefinitely.
r. Without making a will.
s. S/He who has a right to a beneficial interest in and out of an estate, the legal title to which is vested in another.
t. An abstract; a headnote; a note prefixed to the report of an adjudged case.
u. An accusation exhibited against a person for some criminal offense.
v. Doing of unlawful act or of lawful act in unlawful manner to injury of another's person or property.

Answers: 1.A; 2.K; 3.P; 4.H; 5.L; 6. O; 7.C; 8.I; 9.Q; 10.J; 11.R; 12.M; 13.T; 14.S; 15.B; 16.G; 17.F; 18.E; 19.N; 20.D.

1201.03.02 Pretest Directions (Lessons 6-10): Write each legal term as your instructor dictates. After you have written all twenty terms, match the letter of the definition on the right with the correct term on the left. There is only one correct answer per term, and there are more definitions than terms.

_____ 1. (proximate cause)
_____ 2. (recrimination)
_____ 3. (tort)
_____ 4. (locus sigilli)
_____ 5. (hereditaments)
_____ 6. (supersedeas)
_____ 7. (mayhem)
_____ 8. (garnishment)
_____ 9. (res ipsa loquitur)
_____ 10. (moot)
_____ 11. (res judicata)
_____ 12. (devise)
_____ 13. (certiorari)

a. The name of a writ containing a command to stay the proceedings at law.
b. Any right to, or interest in, land which may subsist in another to the diminution of its value, but consistent with the passing of the fee.
c. That which, in a natural and continuous sequence, unbroken by any efficient intervening cause, produces the injury.
d. One which is private and created for charitable and benevolent purposes.
e. A warning to a person not to pay the money or deliver the property, but to appear and answer the plantiff's suit.
f. A matter adjudged.
g. Let the buyer beware (or take care).

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_____ 14. (substantive law)
_____ 15. (encumbrance)
_____ 16. (hypothecate)
_____ 17. (habeas corpus)
_____ 18. (litigation)
_____ 19. (eleemosynary corporation)
_____ 20. (caveat emptor)

h. A variety of writs to bring a party before a court or judge.
i. A private or civil wrong or injury.
j. The name of a writ of review or injury.
k. Rebuttable presumption that defendant was negligent.
l. Contest in a court of justice for the purpose of enforcing a right.
m. A subject for argument; unsettled; undecided.
n. The place occupied by the seal of written instruments.
o. To pledge a thing without delivering the possession of it to the pledges.
p. A testamentary disposition of land or realty; a gift of real property by the last will and testament of the donor.
q. That part which creates, defines, and regulates rights.
r. Unlawfully and violently depriving another of the use of such of his/her members as may render the individual less able in fighting, either to defend him/herself, or to annoy an adversary.
s. Things capable of being inherited.
t. A charge made by an accused person against the accuser.
u. That which cannot be defeated, revoked, or made void.
v. A public officer whose function it is to administer oaths; to attest and certify, by his/her hand and official seal, certain classes of documents.

Answers: 1.C; 2.T; 3.I; 4.N; 5.S; 6.A; 7.R; 8.E; 9.K; 10.M; 11.F; 12.P; 13.J; 14.Q; 15.B; 16.O; 17.H; 18.L; 19.D; 20.G.

1201.03.03 Pretest Directions (Lessons 11-15): Write each legal term as your instructor dictates. After you have written all twenty terms, match the letter of the definition on the right with the correct term on the left. There is only one correct answer per term, and there are more definitions than terms.

_____ 1. (demurrer)
_____ 2. (nuncupative will)
_____ 3. (quasi judicial)
_____ 4. (tenancy in common)
_____ 5. (probate)
_____ 6. (ex officio)

a. An allegation of a defendant, which, admitting the matter of fact alleged by the bill to be true, shows that as they are therein set forth they are insufficient for the plantiff to proceed upon or to obligate the defendant to answer.
b. A supplement or an addition to a will.
c. A way by which that part of the property is disposed of

Number

_____ 7. (prima facie)
_____ 8. (estoppel)
_____ 9. (obiter dictum)
_____ 10. (estate in severalty)
_____ 11. (codicil)
_____ 12. (ex parte)
_____ 13. (jurisprudence)
_____ 14. (acquiescence)
_____ 15. (culpable)
_____ 16. (presumption)
_____ 17. (residuary clause)
_____ 18. (chattel)
_____ 19. (escrow)
_____ 20. (chancery)

Instructional Ideas

which remains after satisfying bequests and devises.

d. By virtue of the office; without any other warrant or appointment than that resulting from the holding of a particular office.
e. A writing, or deed, delivered by the grantor, promisor or obligor into the hands of a third person, to be held by the latter until the happening of a contingency or performance of a condition.
f. The philosophy of law, or the science which treats of the principles of positive law and legal relations.
g. The action, discretion, etc., of public administrative officers, who are required to investigate facts, or ascertain the existence of facts, and draw conclusions from them, as a basis for their official action
h. An individual's own act or acceptance closes his/her mouth to allege or plead the truth.
i. Words of a prior opinion entirely unnecessary for the decision of the case.
j. Dictated by the testator in his/her last sickness before a sufficient number of witnesses, and afterwards reduced to writing.
k. Equity, equitable jurisdiction; a court of equity; the system administered in courts of equity.
l. Involving the breach of a legal duty or the commission of a fault.
m. On one side only; by or for one party; done for; in behalf of, or on the application of, one party only.
n. Held by several and distinct titles by unity of possession, neither knowing his/her own severally, and therefore they all occupy promiscuously.
o. An article of personal property; any species of property not amounting to a freehold or fee in land.
p. On the first appearance; so far as can be judged from the first disclosure, a fact presumed to be true unless disproved by some evidence to the contrary.

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q. An adjudged case or decision of a court of justice, considered as furnishing an example or authority for an identical or similar case afterwards arising.
r. Conduct recognizing the existence of a transaction, and intended, in some extent at least, to carry the transaction, or permit it to be carried, into effect.
s. Held by a person in his/her own right only, without any other person being joined or connected with the individual in point of interest, during his/her estate.
t. An absolute estate is one in which the owner is entitled to the entire property, with unconditional power of disposition during his/her life, and descending to the individual's heirs and legal representatives upon his/her death intestate.
u. Originally, relating to proof, afterwards, relating to the proof of wills.
v. An inference affirmative of disaffirmative of the truth or falsehood of any proposition or fact drawn by a process of probable reasoning in the absence of actual certainty of its truth or falsehood.

Answers: 1.A; 2.J; 3.G; 4.N; 5.U; 6.D; 7.P; 8.H; 9.I; 10.S; 11.B; 12.M; 13.F; 14.R; 15.L; 16.V; 17.C; 18.O; 19.E; 20.K.

1202.03.04 Pretest Directions (Lessons 16-20): Write each legal term as your instructor dictates. After you have written all twenty terms, match the letter of the definition on the right with the correct term on the left. There is only one correct answer per term, and there are more definitions than terms.

_____ 1. (change of venue)
_____ 2. (res gestae)
_____ 3. (bailiff)
_____ 4. (incumbent)
_____ 5. (fiduciary)
_____ 6. (recognizance)
_____ 7. (quo warranto)
_____ 8. (chose in action)
_____ 9. (exonerate)

a. To annul, to set aside; to cancel or rescind; to render an act void.
b. A law passed after the commission of an act, which retrospectively changes the legal consequences or relation of such deed.
c. The term is derived from the Roman law, and means a person holding the character of a trustee, in respect to the trust and confidence involved in it and the scrupulous good faith and candor which it requires.

Number

_____ 10. (foreclosure)
_____ 11. (litigant)
_____ 12. (unlawful detainer)
_____ 13. (allegation)
_____ 14. (ex post facto)
_____ 15. (default)
_____ 16. (sufferance)
_____ 17. (misdemeanor)
_____ 18. (indictment)
_____ 19. (bailment)
_____ 20. (mandamus)

Instructional Ideas

d. An obligation of record, entered into before some court of record, or magistrate duly authorized, with condition to do some particular act.
e. Toleration; negative permission by not forbidding, license implied from the omission or neglect to enforce an adverse right.
f. The removal of a suit begun in one county or district to another county or district for trial.
g. To relieve; to exculpate.
h. A party to a lawsuit; usually spoken of active parties, not of nominal ones.
i. This is the name of a writ which issues from a court of superior jurisdiction and is directed to a private or municipal corporation, commanding the performance of a particular act therein specified.
j. A writ, in the nature of a writ or right for the king, against an individual who claimed or usurped any office, franchise, or liberty, in inquire by what authority s/he supported his/her claim, in order to determine the right.
k. One to whom some authority, care, guardianship, or jurisdiction is delivered, committed or intrusted.
l. An accusation in writing found and presented by a grand jury to the court in which it is impaneled, charging that a person has done some act which, by law, is a public offense.
m. Those circumstances which are the automatic and undersigned incidents of a particular litigated act, which may be separated from act by lapse of time more or less appreciable, and which are admissible when illustrative of such act.
n. A personal right not reduced into possession, but recoverable by a suit at law.
o. According to value.
p. The assertion, declaration, or statement of a party to an action, made in a pleading, setting out what s/he expects to prove.

Number **Instructional Ideas**

q. To shut out, to bar, to destroy an equity of redemption.
r. A person who is in present possession of an office; one who is legally authorized to discharge the duties of an office.
s. The unjustifiable retention of the possession of lands by one
t. By its derivation, a failure.
u. Offenses lower than felonies and generally those punishable by fine or imprisonment otherwise than penitentiary.
v. A delivery of good or personal property, by one person to another, in trust for the execution of a special object upon or in relation to such goods, and upon a contract, to perform the trust and carry out such object, and thereupon either to redeliver the goods to the bailor or otherwise dispose of the same in conformity with the purpose of the trust.

Answers: 1.F; 2.M; 3.K; 4.R; 5.C; 6.D; 7.J; 8.M; 9.G; 10.Q; 11.H; 12.P; 13.P; 14.B; 15.T; 16.E; 17.U; 18.L; 19.V; 20.D.

1203.04.01 Posttest Directions (Lessons 21-25): Write each legal term as your instructor dictates. After you have written all twenty terms, match the letter of the definition on the right with the correct term on the left. There is only one correct answer per term, and there are more definitions than terms.

_____ 1. (quorum)
_____ 2. (appellate court)
_____ 3. (inter vivos)
_____ 4. (abet)
_____ 5. (injunction)
_____ 6. (collusion)
_____ 7. (warrant)
_____ 8. (composition)
_____ 9. (vendee)
_____ 10. (acquittal)
_____ 11. (subscription)
_____ 12. (probate court)
_____ 13. (attestation)
_____ 14. (succession)

a. Aiding; attendant upon; describing a proceeding attendant upon or which aids another proceeding considered as principal.
b. A prohibitive writ issued by a court of equity, at the suit of a party complainant, directed to a party defendant in the action, forbidding the latter to do some act.
c. An advocate; a counsellor learned in the law who is engaged in conducting the trial or argument of causes.
d. A majority of the entire body.
e. A release, absolution, or discharge from an obligation, liability, or engagement.
f. An estate for life in fee.
g. A writ or precept from a competent authority directing the doing of an act, and addressed to an officer or person competent to do the act.

Number

____ 15. (ancillary)
____ 16. (versus)
____ 17. (freehold)
____ 18. (stratagem)
____ 19. (testate)
____ 20. (barrister)

Instructional Ideas

h. The act of witnessing an instrument in writing, at the request of the part making the same, and subscribing it as a witness.
i. One who has made a will; one who dies leaving a will.
j. One appointed administrator of deceased's estate after executors named in will refused to act.
k. Between the living; from one living person to another.
l. French word including knowledge of the wrongful purpose of the perpetrator and counsel and encouragement in the crime.
m. A purchaser or buyer; one to whom anything is sold. Generally used of the purchaser of real property, one who acquires chattle by sale being called a "buyer."
n. Having jurisdiction over the grant of administration and the supervision of the management and settlement of the estates of descendants.
o. The prosecuting officer of the United States government in each of the federal judicial districts.
p. An agreement between two more or persons to defraud a person of his rights by the forms of law, or to obtain an object forbidden by law.
q. A deception either by words or actions, in times of war, in order to obtain an advantage over the enemy.
r. Having jurisdiction of appeal and review; to which causes are removable by appeal, certiorari, or error.
s. Latin: against.
t. An agreement, made upon a sufficient consideration, between an insolvent debtor and his/her creditors, whereby the latter, for the sake of immediate payment, agrees to accept a dividend less than the whole amount of their claims.
u. The devolution of title to property under the law of descent and distribution.
v. The act of writing one's name under a written instrument.

Answers: 1.D; 2.R; 3.K; 4.L; 5.B; 6.P; 7.G; 8.T; 9.M; 10.E; 11.V; 12.N; 13.H; 14.U; 15.A; 16.S; 17.F; 18.Q; 19.I; 20.C.

Number Instructional Ideas

1201.04.02 Posttest Directions (Lessons 26-30): Write each legal term as your instructor dictates. After you have written all twenty terms, match the letter of the definition on the right with the correct term on the left. There is only one correct answer per term, and there are more definitions than terms.

_____ 1. (proxy)
_____ 2. (attorney general)
_____ 3. (alias)
_____ 4. (corporeal property)
_____ 5. (binder)
_____ 6. (corpus delicti)
_____ 7. (alibi)
_____ 8. (Corpus Juris)
_____ 9. (assumpsit)
_____ 10. (appellant)
_____ 11. (surrogate)
_____ 12. (affidavit)
_____ 13. (deposition)
_____ 14. (adjudicate)
_____ 15. (subrogation)
_____ 16. (dower)
_____ 17. (arraign)
_____ 18. (venue)
_____ 19. (compensatory damages)
_____ 20. (attorney's lien)

a. A written or printed declaration or statement of facts, made voluntarily, and confirmed by the oath or affirmation of the party.
b. The neighborhood, place, or county in which an injury is declared to have been done, or fact declared to have happened.
c. The body (material substance) upon which a crime has been committed.
d. Otherwise; equivalent of "otherwise called", indicating one was called by one or the other of two names.
e. The substitution of one person in the place of another with reference to a lawful claim, demand, or right.
f. The right of an attorney at law to hold or retain in his/her possession the money or property of a client until proper charges have been adjusted and paid.
g. A promise or engagement by which one person assumes or undertakes to do some act or pay something to another.
h. A person who is substituted or deputed by another to represent and act for him/her, particularly in some meeting or public body.
i. Such as affects the senses, and may be seen and handled, as opposed to that which cannot be seen or handled, and exists only in contemplation.
j. To bring a prisoner to the bar of the court to answer the matter charged upon him/her in the indictment.
k. A term used to signify a book comprehending several collections of law.
l. A claim presented by a defendent in opposition to or deduction from the claim of the plaintiff.
m. The name given in some of the states to the judge or judicial officer who has the administration of probate matters, guardianships, etc.

Number | Instructional Ideas

n. To settle in the exerise of judical authority. To determine finally.
o. One who applies to the courts for legal redress.
p. Such as will simply make good or replace the loss caused by the wrong or injury.
q. The party who takes an appeal from one court of jurisdiction to another.
r. The testimony of a witness taken upon interrogators, not in open court.
s. The chief law officer of the realm, being created by letters patient, whose office is to exhibit informations and prosecute.
t. The provision which the law makes for a widow out of the lands or tenements of her husband, for her support and the nurture of her children.
u. In criminal law, elsewhere;in another place.
v. The memorandum of an agreement for insurance, intended to give temporary protection pending investigation of the risk and issuance of a formal policy.

Answers: 1.H; 2.S; 3.D; 4.I; 5.V; 6.C; 7.U; 8.K; 9.G; 10.Q; 11.M; 12.A; 13.R; 14.N; 15.E; 16.T; 17.J; 18.B; 19.P; 20.F.

1201.04.03 Posttest Directions (Lessons 31-35): Write each legal term as your instructor dictates. After you have written all twenty terms, match the letter of the definition on the right with the correct term on the left. There is only one correct answer per term, and there are more definitions than terms.

_____ 1. (liquidated)
_____ 2. (consanguinity)
_____ 3. (homicide)
_____ 4. (rescind)
_____ 5. (usury)
_____ 6. (guardian ad litem)
_____ 7. (estop)
_____ 8. (insolvent)
_____ 9. (de facto)
_____ 10. (vendue)
_____ 11. (tort feasor)
_____ 12. (conversion)

a. Property owned in common by a husband and wife as a kind of marital partnership.
b. Actually; indeed; in reality.
c. A process to cause a witness to appear and give testimony, commanding him/her to lay aside all pretenses and excuses, and appear before a court magistrate.
d. In or with good faith; honestly, openly, and sincerely; without deceit or fraud.
e. A wrong-doer.
f. A person appointed by a court of justice to prosecute or defend for an infant in any suit to which s/he may be a party.

Number

_____ 13. (arbitration)
_____ 14. (subpoena)
_____ 15. (venire)
_____ 16. (brief)
_____ 17. (domain)
_____ 18. (bona fide)
_____ 19. (rebuttal)
_____ 20. (overt)

Instructional Ideas

g. The showing that statement of witnesses as to what occurred is not true.
h. Ascertained; determined; fixed; settled; made clear or manifest.
i. An illegal contract for a loan or forbearance of money, goods, or things in action, by which illegal interest is reserved, or agreed to be reserved or taken.
j. The exchange of property from real to personal or from personal to real, which takes place under some circumstances in the consideration of the law.
k. Open; manifest; public; issuing an action, as distinguished from that which rests merely in intention or design.
l. A written document; a letter; a writing in the form of a letter. An epitome of some larger document, or of a series of papers, facts and circumstances, or propositions.
m. To bar, or impede; to prevent; to preclude.
n. Kinship; blood relationship; the connection or relation of persons descended from the same stock or common ancestor.
o. The complete and absolute ownership of land, a paramount and individual right of property in land.
p. To come; to appear in court. Sometimes used as the name of the writ for summoning a jury.
q. The condition of a person who is uable to pay his/her debts.
r. The killing of any human creature.
s. A sale, generally a sale at public auction; and more particularly a sale so made under authority of law, as by a constable, sheriff, tax collector, administrator, etc.
t. The submission for determination of disputed matter to private unofficial persons selected in manner provided by law or agreement.
u. To abrogate, annul, avoid, or cancel a contract, particularly, nullifying a contract by the act of a party.
v. To overthrow, vacate, set aside, make void, annul, repeal, or revoke, as to reverse a judgment, sentence or decree, or to change to the contrary or to a former condition.

Number **Instructional Ideas**

Answers: 1. H; 2.N; 3.R; 4.U; 5.I; 6.F; 7.M; 8.Q; 9.B; 10.S; 11.E; 12.J; 13.T; 14.C; 15.P; 16.L; 17.O; 18.D; 19.G; 20.K.

1201.05.01 *Black's Law Dictionary* (Rev. 4th ed., written by Henry Campbell Black, published by West Publishing Company, St. Paul, MN, 1968) is the standard, large, legal dictionary. Some of the smaller resources are equally useful for Legal Secretarial training and are perhaps more attractive for their price and size. The following might be considered:

Law Dictionary by Steven H-Gifis
J.D. Barron's Educational Series, Inc.
Woodbury, NY (1975)

Law Dictionary of Practical Definitions by Edward J. Bander
Legal Alamanac Series, No. 58
Oceana Publications, Inc.
Dobbs Ferry, NY, (1966)

10,000 Legal Words by Margaret A. Hurtz *et al*.
Gregg Division, McGraw-Hill Book Company
New York (1970)

Law Dictionary, 2nd ed., by Max Radin and Lawrence G. Greene (eds.)
Oceana Publications, Inc.
Dobbs Ferry, NY (1970)

1201.05.02 "Legal Terminology for Legal Secretarial Training" developed by Dr. Alice L. Holst and on file in BEDDS (see the order blank on page 30) is divided into eleven modules. Use the following identification numbers for requesting materials:

Module 1 (Lessons 1-5):	I.D. # 033-302.30	Module 7 (Lessons 31-35):	I.D. # 033.302.36
Module 2 (Lessons 6-10):	I.D. # 003-302.31	Module 8 (Lessons 36-40):	I.D. # 033-302.37
Module 3 (Lessons 11-15):	I.D. # 033-302.32	Module 9 (Lessons 41-45):	I.D. # 033-302.38
Module 4 (Lessons 16-20):	I.D. # 033-302.33	Module 10 (Lessons 46-50):	I.D. # 033-302.39
Module 5 (Lessons 21-25):	I.D. # 033-302.34	Module 11 (Lessons 51-55):	I.D. # 033-302.40
Module 6 (Lessons 26-30):	I.D. # 033-302.35		

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BEDDS-2

Number	Condition	Performance	Standard
1202.01.01	Given discussion and demonstration of legal style and practice exercises,	the student will complete law blanks and type complete documents	with 100% mastery of legal style by the end of the instructional cycle.
1202.01.02	Given printed forms, i.e., law blanks,	the student will complete the forms with the required information	to the satisfaction of the instructor.
1202.01.03	Given documents to be completely typed,	the student will produce perfect copy, utilizing proper legal style,	at the minimum rate of 40 wpm and to the satisfaction of the instructor or student's supervisor at the work experience station.
1202.01.04	Given miscellaneous items for typing (i.e., income-tax withholding statements, notices, mailing lists, curriculum vitae, etc.),	the student will prepare the items neatly, accurately, and attractively	at the minimum rate of 40 wpm and to the satisfaction of the instructor or student's supervisor at the work experience station.
1202.01.05	Given documents and forms for typing which require carbon copies, both single and multiple,	the student will prepare perfect carbon copies	at the minimum rate of 40 wpm and to the satisfaction of the instructor of student's supervisor at the work experience station.
1202.01.06	Given errors during typing,	the student will apply the techniques of clean erasing	to produce neat, accurate, and attractive copy.
1202.01.07	Given paragraphs which would normally break at the bottom of a page of a legal document,	the student will apply a z-ruling	with 100% accuracy.

Number	Condition	Performance	Standard
1202.01.08	Given typed copy which has been stapled but needs additional information or corrections,	the student will back-feed the material into the typewriter to make the required adjustment	to produce neat, accurate, and attractive copy.
1202.01.09	Given questions of style, spelling, meaning, and the like involving legal documents or legal office procedures,	the student will utilize legal references and resources effectively	to resolve the question and to the satisfaction of the instructor.
1202.01.10	Given typed copy, legal forms, completely typed documents, or miscellaneous assignments,	the student will proofread all work	with 100% accuracy and with an eye for neatness and attractiveness.
1202.01.11	Given completed legal documents,	the student will assemble and bind the documents	neatly and attractively to the satisfaction of the instructor or the supervisor at the student's work station.

Number Instructional Ideas

GENERAL COMMENTS:

The work of the law office is exacting. The vocabulary of law is highly specialized, matters of form and procedure are complicated, and an inaccurate record can be extremely expensive. The hours are long, and much of the work is done under pressure. It is not surprising, then, that Legal Secretaries are among the highest paid in the field.

1202.02.01 A. Introduce students to elements of legal style first by demonstration. Using material with overhead projectors or individual handouts, show students items such as: court headings, repeating words in numbers, the signature section of the legal document, margins, spacing, z-rulings, capitalization, numbers, etc. Since legal style can vary among legal offices, show students examples from more than one office so that they may compare the differences. Emphasize in particular the importance of competency in the mechanics of English usage and grammar. Point out the complexity of language in many legal documents and analyze sentence structure. Show students how differences in punctuation can change the meaning of documents.

B. Usage and tradition prescribe that certain expressions in legal papers be typed in solid caps. The examples which follow illustrate this. Have students research others.

IN WITNESS WHEREOF, which introduces the signature clause.
THIS INDENTURE, which introduces a deed.
FOR VALUE RECEIVED, which begins a promissory note.
AGREEMENT OF THIS AGREEMENT, which introduces a contract.
KNOW ALL MEN BY THESE PRESENTS, which introduces certain noncourt documents.

C. Legal style is highly variable among legal offices. For this reason, it is advisable to return to this topic from time to time as students gain experience at work sites (assuming there is some kind of work experience in conjunction with classroom training). Students may bring in samples from their work stations which illustrate differences in legal style. (Advise them to secure permission of the employer if they do so.) Alternatively, they can research--individually or in small groups--the variability of legal style in local offices. This topic, and reference to it from time to time in the instructional cycle, has the added value of helping students learn the flexibility they will need to work with a variety of attorneys and/or in a variety of offices.

Number Instructional Ideas

1202.02.02 A. Some attorneys use a considerable number of forms in their practices. Filling in forms, i.e., law blanks, involves the following techniques:

- correctly typing on lines
- crowding and spreading
- double lines
- erasing in small places
- waste
- choosing correct forms, in some cases

B. Alignment is an important consideration for correctly typing on forms. Instruct students to insert a sheet of lined paper and type on those lines for practice. Explain that the defenders must just barely touch on all lines, which is a matter of learning alignment with the printing point. Illustrate how this differs with every typewriter (they are not precision machines), and therefore alignment requires experimentation.

C. Whether to type above or below the line can also be an issue with printed forms. In the course of having students practice with printed forms, give them at least one example where they are expected to provide information below the line.

D. Teach forms periodically throughout the instructional cycle to reinforce newly acquired skills. Give students practice with a wide variety of forms.

1202.02.03 A. The problems of completely typed documents are quite different from the problems of filling in law blanks, i.e., printed forms. Choosing the correct paper is often the first problem. Legal offices can have several types of paper: some are long with the heading printed on the top; some are 9 pound, others 20 pound; some have printing down the side; etc. Carbon paper can be equally variable. Consider researching the legal offices in your area to determine what is expected in each office.

B. As was said earlier concerning printed forms, students will benefit from experience with a variety of completely typed documents. If the dictation and transcription module is organized as a lab which recurs weekly throughout the instructional cycle, students will obtain the experience which exposes them to and gives them proficiency with a variety of completely typed documents.

1202.02.04 In addition to legal forms and documents, students will likely be expected to type a variety of miscellaneous items. The following is a list of jobs Legal Secretarial students in Napa were asked to complete during work experience:

Number Instructional Ideas

1. Resumes
2. Telephone cards
3. Income-tax withholding statements
4. Notices
5. Orders
6. Membership cards
7. Mailing lists
8. Seminar agendas
9. Inserts
10. Labels on letterheads
11. Address labels
12. Curriculum vitae

1202.02.05 A. Intermediate and advanced typing books abound which have excellent instructional material on teaching/learning techniques for producing carbon copies. Points which should be covered for Legal Secretarial training include:

- number of carbon copies per type of legal document
- use of a folder sheet over several carbon copies to replace them in the typewriter
- reveral of carbons for maximum use
- differences between impregnated and waxed carbon paper
- number of times a carbon should be used
- use of a pencil eraser or putty to lift carbon off first when making a correction
- use of cardboard to help make corrections on carbon copies
- use of razor blades to help make corrections
- use of white chalk applied to the back of a correction
- making of carbon-copy corrections instead of original corrections

B. Demonstration followed by practice will give students experience with carbon copies. During the course of their lab work or work experience, they substantially use these techniques.

1202.02.06 Many of the points covered in the preceding objective apply to clean erasing on original documents as well as carbons. Demonstration, followed by practice, followed by applications on various projects will serve to teach students useful techniques and reinforce skills.

1202.02.07 Z-rulings apply to both printed forms and completely typed documents and are used at the bottom of pages of legal documents where a paragrapn would otherwise be broken and continued on the next page. Teaching/learning z-rulings would include explanation of the technique first, followed by demonstration of its application, practice exercises, and finally reinforcement in the course of completing lab work or jobs assigned during work experience.

Number Instructional Ideas

1202.02.08 Stapled material cannot be run through the typewriter because the staple might damage the platen. Further, disassembling documents is time consuming, provides opportunity for error during reassembly, and can spoil the attractiveness of the original document. Therefore, back-feeding of stapled material is a very useful technique for students to learn. Again, demonstration, practice, and occasional reinforcement should suffice to develop skill.

1202.02.09 A. A unit on reference materials and resources might consist of the following:
- 1) Orientation in the use of the law library
    - a) Location of reference materials
    - b) Mechanics for effective use
- 2) Legal Dictionaries
    - a) Types of dictionaries
        - 1) General dictionaries
        - 2) Specialized dictionaries
    - b) How to use dictionaries
        - 1) Guide words
        - 2) Main entry
        - 3) Pronunciation key
        - 4) Parts of speech
        - 5) Special forms and special spellings
        - 6) Meanings of the word
- 3) Specialized legal references

B. Problem applications will arise continuously as students advance to the production modules (1203 and 1204) and begin producing documents. First, it is recommended that the classroom or learning environment contain a wide variety of legal reference materials and other resources. For example, for a class of 30 students, an instructor might have at least one or two copies of 25 different references on hand (e.g., law books, zip code directories, toll free number directories, dictionaries, etc.). Without giving a grade, have every student read the how-to-use section of every reference and finger through every book to determine what information is contained in each volume.

C. Instruct the class that they are to turn to the classroom reference or to each other for information when they encounter a problem and should only go to the instructor as a last resort. In this way, they will simulate real office situations where employees must rely on and help one another. Students will usually quickly discover that there are one or two references which they use constantly.

Number **Instructional Ideas**

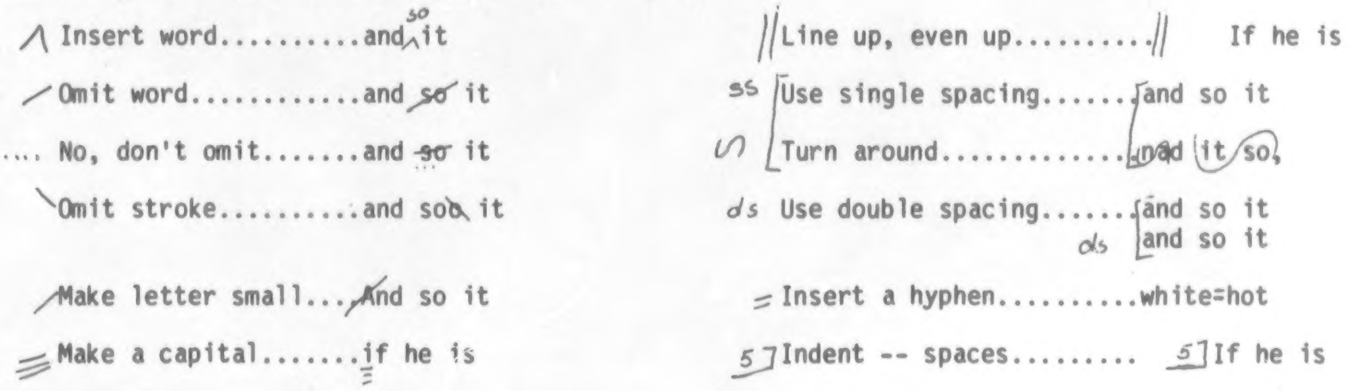
D. Maintain a list in the classroom of additional reference books and their prices. As students encounter problems for which there are no ready references in the classroom, they can either go to the library, go to a bookstore, or order directly from a publisher.

E. Have each student keep a "bad speller's dictionary" at his/her desk to hold those words which are personally troublesome. A small spiral notebook is sufficient to hold such words.

F. Encourage students to use references to help them. Let them know that using a reference is not a stigma and that industry encourages it. The confidence of many students will increase as they realize that using references is not only accepted, but expected.

1202.02.10 A number of English texts or workbooks or office education texts contain proofreading symbols and explanations of how to use them. An initial instructional strategy would involve introducing the proofreading marks to the student on the blackboard or through a handout. Following that, students might receive sample legal documents with errors and corresponding proofreading marks which they could discuss as a class or correct individually as a homework assignment. Following this kind of introduction and practice, students will then actually use the marks extensively as they encounter Modules 1203 and 1204 where actual documents are produced. The following may be of help to instructors.

PROOFREADER'S MARKS FOR ROUGH DRAFTS AND REVISIONS



∧ Insert word..........and so it	// Line up, even up.......... If he is
/ Omit word...........and ~~so~~ it	ss Use single spacing......and so it
.... No, don't omit.......and so it	Turn around.............nad it so
\ Omit stroke..........and soo it	ds Use double spacing......and so it ds and so it
/ Make letter small....And so it	= Insert a hyphen..........white=hot
≡ Make a capital.......if he is	5 Indent -- spaces......... 5 If he is

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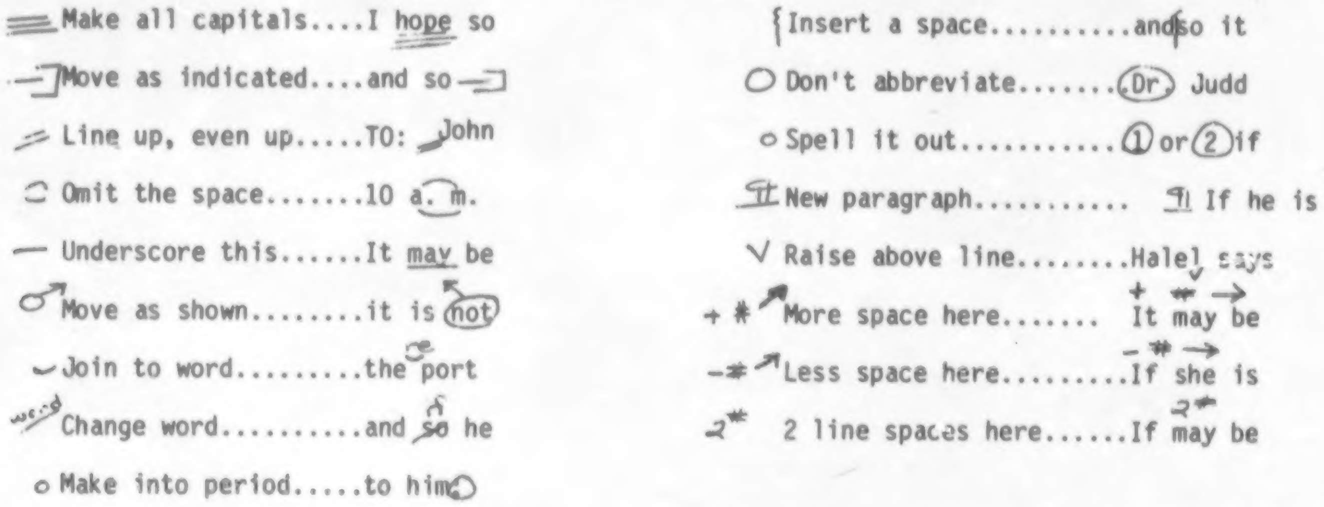
Number Instructional Ideas



Make all capitals....I hope so
Move as indicated....and so
Line up, even up.....TO: John
Omit the space.......10 a. m.
Underscore this......It may be
Move as shown........it is not
Join to word.........the port
Change word..........and so he
Make into period.....to him

Insert a space..........andso it
Don't abbreviate.......Dr. Judd
Spell it out...........1 or 2 if
New paragraph........... If he is
Raise above line........Halel says
More space here....... It may be
Less space here.........If she is
2 line spaces here......If may be

In Modules 1203 and 1204 students will practice the art of proofreading with almost every objective. Most standard texts contain sections on proofreading, as any typist will be expected to do his/her own proofreading. Tips for proofreading aloud or proofing with a co-worker can easily be found. The three kinds of errors of which students should be aware include:

TECHNICAL ARRANGEMENT: Placement on Letterhead
Paragraphing
Arrangement of Letter Parts

CONTENT: Accuracy of Dates
Accuracy of Inside Address with Original Source and with Envelope
Agreement of Salutation and Inside Address
Agreement of Closing with Tone of Message

SYNTAX, SPELLING, AND PUNCTUATION: Complete Sentences
No Omissions or Transposed Words or Phrases
Correct Spelling and Punctuation (Try having students read backwards for misspellings.
Agreement of Verb-Subject, Pronoun-Antecedent, etc.

Number **Instructional Ideas**

1202.02.11 Many legal offices bind documents with a long colored backing which is folded over the top of the document and stapled. Students will need only limited practice in correct binding, but the instructor might take care to check for neatness and attractiveness. A properly bound legal document would be a welcome addition to the student's portfolio of work.

1202.03.01 Ask students to jot down the references which they would expect to find or want to take with them to a legal office. By analyzing the results of this exercise, you will be able to tell how many students are already familiar with references and simply need exposure to additional resources vs. how many are inexperienced with the use of references. You will then be able to plan instruction accordingly or move on to the next module, confident that students have the needed background in this important skill.

1202.03.02 The following short test, or one like it, will assess the student's ability to correct copy which has been proofread.

[introduction

have youheard any additional loud noises lately? If you listen closely, you hear them. It's happening all around you. It is the noise caused as more and more americans drop from Lower-middle class income to Upper-lower class income! Obviously, I don't mean gross income. The income I'm talking about is the net take-home-pay -- adjusted for inflatoin.

What's happening to us? Will we have enough money to keep us warm, well-fed, and happy? Or will inflation and skyrocketing prices force us to cut our shopping list in 2 until we can't even afford to fill a sack at the super market? What does your future looklike? It depends on what kind of decisions you make today.

Introduction

Have you heard any loud noises lately?

If you listen closely, you can hear them. It's happening all around you. It is the noise caused as more and more Americans drop from lower-middle class income to upper-lower class income! Obviously, I don't mean gross income. The income I'm talking about is the net take-home pay--adjusted for inflation.

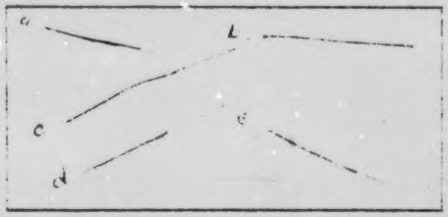
What's happening to us? Will we have enough money to keep us warm, well-fed, and happy? Or will inflation and skyrocketing prices force us to cut our shopping list in two until we can't even afford to fill a sack at the supermarket?

What does your future look like?

It depends on what kind of decisions you make today.[1]

---

[1] Passage taken from Nothing Down by Robert G. Allen, Published by Simon and Schuster, 1980.

Number	Instructional Ideas
1202.03.03	A typing review at the outset of the course is one of the most appropriate pretests for this module. The instructor will discover, at the least, how well a student types on a timed test. The instructor may also want to test twice, once for speed and once for accuracy, to determine a net figure. Although the student's speed may be low (accuracy should be high, however), the instructor may want to keep the student in class, requiring that his/her proficiency improves to a more employable level.
1202.04.01	Using the sample list of proofreading marks in 1202.02.10, the instructor can either scramble one column and have students match the correct meaning to the appropriate mark, or instructors can omit the definitions and posttest students from memory.
1202.04.02	Provide students with a sheet of paper with several lines askew like the small model to the right. On the chalkboard write the information to be typed on each line. Proper placement of information will follow the guidelines suggested in 1202.02.02. 
1202.04.03	Perhaps the best posttest for specialized typing techniques is continuous observation of student work. If students continue to apply the skills taught/learned in this module throughout the instructional cycle, the instructor can be assured that they have mastered the objectives presented here.
1202.05.01	Sample legal forms and documents are contained in Modules 1203 and 1204. In addition, the instructor can gather up printed forms which are no longer used from local offices for use as practice exercises. This approach has the added value of giving the instructor exposure to local legal offices which can have a variety of potential spin-offs (i.e., placement of students is generally easier in offices where the instructor has established rapport; the public relations value for the program is usually enhanced; contacts are made for class presentations later; etc.).
1202.05.02	*The California Book of Forms* is a valuable resource which describes how to complete a wide variety of court forms and shows examples of each.
1202.05.03	Legal offices will often share out-dated reference books with instructors as a matter of course if they know instructors are interested in having them. Although the books are obsolete for the attorney's needs, they are valuable instructional devices nevertheless. Instructors who have established working relationships with local legal offices will most easily come by such materials.

Number	Condition	Performance	Standard
1203.01.01	Given material to be dictated,	the student will either take dictation by hand or supply the originator with materials for machine dictation	for accurate transcription later.
1203.01.02	Given hand or machine dictation,	the student will transcribe insertions to law blanks and complete documents	with 100% accuracy, as well as neatly and attractively.
1203.01.03	Given material for transcription,	students will produce typed copy on a variety of typewriters	with 100% accuracy, as well as neatly and attractively.
1203.01.04	Given transcription involving a variety of miscellaneous items,	the student will produce letters, memos, envelopes, etc.	with 100% accuracy, as well as neatly and attractively.
1203.01.05	Given transcribed material,	the student will proofread for grammar, spelling, punctuation, format, and clarity of content	with 100% accuracy, as well as neatly and attractively.
1203.01.06	Given material for transcription,	the student will either: A. utilize word processing equipment if available or B. recognize and understand the applications of word processing to the legal office	with 100% accuracy if equipment is available or to the satisfaction of the instructor otherwise.

Number	Instructional Ideas
1203.02.01	A. If a legal office is equipped with a dictation system, shorthand is not necessary for a Legal Secretary. However, many employers use it as a screening device and students should be aware of this. In fact, machine transcription is a much more efficient process. Nevertheless, some legal offices do require shorthand, either as the preferred method of dictating or as a device for screening Legal Secretaries. Shorthand is not within the pervue of this supplement, and most Legal Secretarial instructors do not teach shorthand within the context of a Legal Secretarial course. Students who study shorthand should be prepared to show mastery at 80 wpm at the minimum--120 wpm for a Legal Secretary.

B. With machine dictation, there is not a great deal for the Legal Secretary to do. S/He may, however, be knowledgeable enough to advise the originator on dictating techniques, if needed. In order for students to learn effective ways for working with an originator to improve dictation skills, arrange for students to transcribe from poorly dictated material. The Advisory Committee can be a source of dictation, and real-life applications will invariably present several examples of poor dictating techniques. Alternatively, the instructor can prepare appropriate tapes by covering the phone receiver with handkerchiefs, sneezing or clearing the throat in the receiver, and literally talking with a mouthful of marbles. Introduce dictation problems gradually, letting students discover some of the problems for themselves. As they start asking questions about the originators' techniques, opportunities for discussion will arise naturally.

Instruction on how to work with the originator falls into two types of cases: First, there is the office where none of the originators knows how to use the equipment properly. Historically, dictation equipment has not been welcomed by originators. Even though a case can be clearly made for the cost efficiency and simplicity of using dictation equipment, originators still revert to using longhand and shorthand, even with a dictation machine on their desk.

The reasons are simple. People take the path of least resistance and will always revert to well-known habits of doing work. Because the advantages of dictating are often presented as primarily helping the secretary, they may or may not be considered a good incentive for an originator to modify his/her work habits and go through the learning curves involved in a new skill. The incentive to change must be based on advantages to the originator.

When presenting students with a case for using dictation equipment, help students to focus on the advantages to the originators--speed and accuracy of input, simplicity of use. Use statistics when possible--they are easy to remember and have impact. The student may have to be prepared to show the originator how to use the equipment.

Number Instructional Ideas

The other case occurs with troublesome technique: interruptions, lack of vocal clarity, inadequate tone or speed control, background noise from automobiles or airplanes, unaccustomed foreign-language accents, etc. The importance of interpersonal relationships in this situation should be stressed with students. Students might role-play problem situations with each other. Likewise, having students dictate tapes for each other's use helps them gauge the problems of dictating and provides concrete examples of interpersonal resolution.

Points which students can be prepared to cover with originators might include:
1) Types of work which can be dictated efficiently.
2) How to begin dictating (buttons to push)
3) How to listen to dictation, correct errors
4) How to end dictation
5) Procedures for effective dictation
    a) Spelling words
    b) Indicating capitalization
    c) Indicating punctuation
    d) Indicating paragraphs, titles, underscoring
6) What to check if equipment does not work properly
7) Whom to call with problems

1203.02.02 A. Development of dictation/transcription skills will involve practice exercises. In addition to commercial tapes which are readily available, the instructor can ask members of the Advisory Committee to make tapes for students or for students to make tapes for each other. If possible, students should be given the opportunity to practice using all three types of media. Areas which might be emphasized in helping students develop skills, and their possible order of emphasis, might include:
1) Operation of transcribing unit
    a) Volume control
    b) Tuning control
    c) Speed control
    d) Tone control
2) Development of transcription skills
    a) Preparation
        1) Uncover the unit and connect to a wall electric outlet
        2) Attach the accessories (headset, etc.) to the unit
        3) Place the record and the indication slip on the machine
        4) Move the transcribing head to starting position
        5) Turn the motor switch to "On"

Number Instructional Ideas

      6) Listen to special instructions
      7) Adjust the volume and turning mechanism
      8) Adjust the hearing device and foot or hand controls for greater comfort
      9) Review special instructions and corrections
      10) Estimate letter length
      11) Prepare the typewriter, including margin stops, tabs, correct letterhead, and carbon pack
    b) Practice
      1) Proceed to transcribe, typing continuously (See E. on Page 49)
      2) Proofread before removing the letter from the machine
      3) When all letters on the record have been transcribed, remove the record and indication slip
      4) Turn off the machine, disconnect it from the wall outlet, and replace the cover
      5) Prepare the letters for the attorney's signature
  3) Transcribing problems
    a) Corrections
    b) Unusual words
    c) Punctuation
    d) Errors in content
    e) Similar sounding words
    f) Material omitted from dictation
  4) Transcribing letters
    a) Parts of letter
    b) Letter styles
    c) Special letter notations, carbon or photocopies, multi-page letters, and envelopes
    d) Standard business letters
  5) Perfecting the letter
    a) Proofreading
    b) Editing business communications
  6) Other typewriting activities
    a) Manuscript typewriting
    b) Typewriting rough drafts
    c) Tabular typewriting
  7) Other business communications
    a) Urgent messages
    b) Repetitive correspondence
    c) Intracompany messages

Number Instructional Ideas

NOTE: Students have much difficulty envisioning how the finished document should look. They need much practice in this area so they will be able to recognize whether a document is correctly produced.

B. Students should be aware that proficiency is more than speed. The U.S. Department of State, for example, gives two timed typing tests, one for speed and one for accuracy, and then derives a net proficiency. The traditional typing test, based on the International Typing Rules, is taken from straight copy and is not usually an accurate reflection of the type of work an employee will encounter in the real office. While efforts have been and continue to be made to have employers change their methods of testing (e.g., the California State Personnel Board was first approached by CEBA in 1971), to date the traditional method remains the norm. The standard of proficiency given for this module is based on industry expectations and is a net figure, taking into account both speed and accuracy.

C. One possible strategy is to set up a lab in the classroom for machine transcription. At least one class period per week would be devoted to voicescription lab. Each student would be assigned a desk, and at each desk would be a different assignment. Students would change desks with every lab. Not only would this give students extensive practice with different transcribed material, but they would also experience a variety of typewriters and transcribers. The schedule which follows is one suggested organizational pattern. For example, the student originally assigned desk 20 will occupy desk 10 during the fourth week and will type a clean copy of the material roughed out the preceding week. (There are not enough voicescription machines in this lab). The student originally assigned desk 13 will occupy desk 11, which is equipped with a voicescription machine.

SCHEDULE FOR TRANSCRIPTION LABORATORIES

	Week												
Desk	1	2	3	4	5	6	7	8	9	10	11	12	13
1	1C	6V	2C	7V	3C	8V	4C	9V	5C	10V	11C	12V	20C
2	2C	7V	3C	8V	4C	9V	5C	10V	11C	12V	20C	13V	21C
3	3C	8V	4C	9V	5C	10V	11C	12V	20C	13V	21C	14V	22C
4	4C	9V	5C	10V	11C	12V	20C	13V	21C	14V	22C	15V	23C
5	5C	10V	11C	12V	20C	13V	21C	14V	22C	15V	23C	16V	24C
6	6V	2C	7V	3C	8V	4C	9V	5C	10V	11C	12V	20C	13V
7	7V	3C	8V	4C	9V	5C	10V	11C	12V	20C	13V	21C	14V
8	8V	4C	9V	5C	10V	11C	12V	20C	13V	21C	14V	22C	15V
9	9V	5C	10V	11C	12V	20C	13V	21C	14V	22C	15V	23C	16V
10	10V	11C	12V	20C	13V	21C	14V	22C	15V	23C	16V	24C	17V
11	11C	12V	20C	13V	21C	14V	22C	15V	23C	16V	24C	17V	25C
12	12V	20C	13V	21C	14V	22C	15V	23C	16V	24C	17V	25C	18V
13	13V	21C	14V	22C	15V	23C	16V	24C	17V	25C	18V	26C	19V
14	14V	22C	15V	23C	16V	24C	17V	25C	18V	26C	19V	1C	6V
15	15V	23C	16V	24C	17V	25C	18V	26C	19V	1C	6V	2C	7V
16	16V	24C	17V	25C	18V	26C	19V	1C	6V	2C	7V	3C	8V
17	17V	25C	18V	26C	19V	1C	6V	2C	7V	3C	8V	4C	9V
18	18V	26C	19V	1C	6V	2C	7V	3C	8V	4C	9V	5C	10V
19	19V	1C	6V	2C	7V	3C	8V	4C	9V	5C	10V	11C	12V
20	20C	13V	21C	14V	22C	15V	23C	16V	24C	17V	25C	18V	26C
21	21C	14V	22C	15V	23C	16V	24C	17V	25C	18V	26C	19V	1C
22	22C	15V	23C	16V	24C	17V	25C	18V	26C	19V	1C	6V	2C
23	23C	16V	24C	17V	25C	18V	26C	19V	1C	6V	2C	7V	3C
24	24C	17V	25C	18V	26C	19V	1C	6V	2C	7V	3C	8V	4C
25	25C	18V	26C	19V	1C	6V	2C	7V	3C	8V	4C	9V	5C
26	26C	19V	1C	6V	2C	7V	3C	8V	4C	9V	5C	10V	11C

V = Voicescription. You are scheduled to use a transcriber. You should learn to operate the typewriter and the transcriber by reading the instructions and the manual to the typewriter. If you have difficulty, ask the student who used the machine the previous week. Type a corrected copy of the transcript as rapidly as you can, listening to the recording and following the key to the recording. As you go, write out by hand a word study of any words you do not use regularly. Next week you will be scheduled to use a typewriter at which you will type a clean copy of your transcript and your word study.

SCHEDULE FOR TRANSCRIPTION LABORATORIES

Desk	Week 14	15	16	17	18	19	20	21	22	23	24	25	26
1	13V	21C	14V	22C	15V	23C	16V	24C	17V	25C	18V	26C	19V
2	14V	22C	15V	23C	16V	24C	17V	25C	18V	26C	19V	1C	6V
3	15V	23C	16V	24C	17V	25C	18V	26C	19V	1C	6V	2C	7V
4	16V	24C	17V	25C	18V	26C	19V	1C	6V	2C	7V	3C	8V
5	17V	25C	18V	26C	19V	1C	6V	2C	7V	3C	8V	4C	9V
6	21C	14V	22C	15V	23C	16V	24C	17V	25C	18V	26C	19V	1C
7	22C	15V	23C	16V	24C	17V	25C	18V	26C	19V	1C	6V	2C
8	23C	16V	24C	17V	25C	18V	26C	19V	1C	6V	2C	7V	3C
9	24C	17V	25C	18V	26C	19V	1C	6V	2C	7V	3C	8V	4C
10	25C	18V	26C	19V	1C	6V	2C	7V	3C	8V	4C	9V	5C
11	18V	26C	19V	1C	6V	2C	7V	3C	8V	4C	9V	5C	10V
12	26C	19V	1C	6V	2C	7V	3C	8V	4C	9V	5C	10V	11C
13	1C	6V	2C	7V	3C	8V	4C	9V	5C	10V	11C	12V	20C
14	2C	7V	3C	8V	4C	9V	5C	10V	11C	12V	20C	13V	21C
15	3C	8V	4C	9V	5C	10V	11C	12V	20C	13V	21C	14V	22C
16	4C	9V	5C	10V	11C	12V	20C	13V	21C	14V	22C	15V	23C
17	5C	10V	11C	12V	20C	13V	21C	14V	22C	15V	23C	16V	24C
18	11C	12V	20C	13V	21C	14V	22C	15V	23C	16V	24C	17V	25C
19	20C	13V	21C	14V	22C	15V	23C	16V	24C	17V	25C	18V	26C
20	19V	1C	6V	2C	7V	3C	8V	4C	9V	5C	10V	11C	12V
21	6V	2C	7V	3C	8V	4C	9V	5C	10V	11C	12V	20C	13V
22	7V	3C	8V	4C	9V	5C	10V	11C	12V	20C	13V	21C	14V
23	8V	4C	9V	5C	10V	11C	12V	20C	13V	21C	14V	22C	15V
24	9V	5C	10V	11C	12V	20C	13V	21C	14V	22C	15V	23C	16V
25	10V	11C	12V	20C	13V	21C	14V	22C	15V	23C	16V	24C	17V
26	12V	20C	13V	21C	14V	22C	15V	23C	16V	24C	17V	25C	18V

C = Clean copy. You are scheduled to use a typewriter. You should learn to use the typewriter by consulting the manual to the typewriter. If you have difficulty, ask the student who used the typewriter the previous week. Type a clean copy of your corrected-copy transcript and your word study.

Number Instructional Ideas

D. Transcription from a machine has certain hazards. One is that the transcribed material has to make sense, because it is very easy to misunderstand. Second, a lab needs to have a variety of transcribers, because although the mechanics of handling a transcriber are comparatively simple, each one is so different from the other that a student may feel at a loss on the job and thrown by the fact that the office machine looks different and functions differently. It is therefore a great advantage to have a variety of equipment.

E. The most important thing students can learn is the timing involved in voicescription. Illustrate with a double line how the top line represents the voice, the bottom line represents the typing. Immediately the voice will start to get ahead, out distance typing, but as soon as the voice reaches the point where the transcriptionist is afraid she will forget, the machine should be stopped. Meanwhile, the typing keeps on going until it almost catches up, then the voice starts again and immediately begins to out distance typing. Students must be warned not to type, then listen; type, then listen. This limits the speed of transcription with no way to overcome an improper habit.

1203.02.03 Students should be able to use all the different machines in the classroom or skills center. If it happens that there is only one type of machine available for students, the instructor might consider asking local businesses or industry to loan new machines or donate old models which can be used for teaching students the different capabilities of various models. In return for used machines, the School or College Board would give the donor a receipt for income taxes with the value of the machine clearly indicated. (New machines are preferable, of course.)

With a variety of models, students will learn that there are many special-purpose typewriters to match certain jobs for maximum efficiency. In the course of learning how to use these machines properly, students will probably have to use the instructional manuals, and this in turn gives them practice with following directions. For example, if the classroom has a formswriter, students will learn how to type quantities of forms on an appropriate machine. With this model, a special frame is attached to the rear of the machine to hold continuous, fanfolded forms with interleaved carbon paper. The typist does not assemble and insert each set of forms individually. Rather, when the typist finishes typing the forms, s/he merely lifts the special platen, pushes the movable part of the frame holding the carbon to the beginning of the next blank form, and tears off the completed forms.

A decimal tabulation typewriter is another model which is used primarily for the statistical typist who must type columns of figures. However, more and more law firms have word processors which cover this area. The decimal tabulation typewriter has an extra row of keys above the number row, each of which is a tab key that will automatically position the carriage the desired number of digits before the decimal point. With the tab keys located above the numeral row, only the top two rows of keys are used for numerical typing.

Number	Instructional Ideas
	If local business or industry cannot donate used equipment, the instructor might try having local vendors install equipment for short periods of time, enough to allow groups of students to learn the equipment's features and capabilities, if not enough to develop skill.
1203.02.04	A. It is suggested that students have practice with all of the following:

LETTERS
1) Letter placement parts
    a) Date line
    b) Address line
    c) Salutation
    d) Body of letter
    e) Complimentary close
    f) Typed names and official title
    g) Reference initials
    h) Enclosure notation
    i) Copy notation
    j) Attention line
    k) Subject line
    l) Company name
    m) Multi-page letter
2) Letter styles
    a) Modified block with indented paragraphs
    b) Modified block with block paragraphs
    c) Block
    d) Letter with tables
    e) AMS simplified letter
    f) Inverted paragraph letter
    g) Letter with slide headings
3) Envelopes
    a) Address
    b) Addressee notation
    c) Attention line
    d) Mailing notation
    e) Address placement for mechanical mail sorting
    f) New postal regulations

MEMORANDA

OTHER BUSINESS DOCUMENTS
1) News releases
2) Postal cards
3) Reports/manuscripts

Number	Instructional Ideas
	B. An excellent strategy is to take jobs from the community and establish a small production center right in the classroom or skills center. Not being able to take money from the "client" will be counterbalanced by the fact that students may take a little longer to complete their jobs. This technique brings an immediacy to the students' work that is more difficult to get otherwise: students know their work originates from and will go back to business or industry and that their efforts count. This technique also allows work measurement and supplies accounting. Instructors who use this method advise that all jobs be handled and assigned by work order, such as the one on the following page taken from the Levi Strauss Co. Management Services Word Processing Center User's Manual; that everything be done on the back of scrap paper until final copy; and that the client bring his/her own letterhead. Students seem to enjoy this method because they are, in fact, simulating a real production center.
	C. The student is now ready to begin assembling a portfolio of work samples. As the student completes an objective, a sample of his/her work can be placed in the portfolio for later reference. The portfolio is particularly effective for use during job interviews for two reasons: 1) the prospective employer can see samples of the student's work, which are a better indication of the student's range of experience and abilities than a timed test, and 2) a portfolio can often put the student at ease during an interview, illustrating what s/he knows with work that is familiar.
1203.02.05	The same strategies which applied in 1202.02.10 are applicable here, the difference being that students will now be proofreading their own copy.
1203.02.06	A. The legal office of the future will be an automated office, and that day is here now. New developments in computers, office machines, and dictating equipment will greatly affect employment in the legal office. As computers are used more extensively to store information and perform billing, payroll and other calculations, employment of file clerks and many types of office machine operators will level off or decline. At the same time, however, the need for word processing, computer and peripheral equipment operators will increase. A frequent comment during Task Analysis with legal office managers and supervisors was that they expected to have word processing equipment or time-share computer systems within the next two or three years. If schools do not have WP programs, students should at least be made aware of what is happening in the area of WP. If the instructor is fortunate enough to have direct training access to the equipment, then billings, schedulings, etc. can be taught/learned for both the traditional and the modern office. More often, the instructor will not have equipment for training, but the Task Force still recommends attention to

WORK ORDER REQUEST

TIME IN	TIME OUT

Proofreading
Typing error: ☐
Content: ☐
Format: ☐
Time: ____________

Name:	Job Name:	Extension:

WORD PROCESSING:

Date Wanted:	Absolute Due Date:

Group Name:

- ☐ BIS-Sportswear
- ☐ Corporate/ELESCO Factors
- ☐ BIS-Jeanswear
- ☐ Administrative Services
- ☐ DB & OS
- ☐ Data Processing
- ☐ OA
- ☐ Resource Development
- ☐ Retail Standards
- ☐ Strategic Planning
- ☐ Telecommunications

DOCUMENT STORAGE:

- ☐ Memo (Deleted In 1 Week)
- ☐ Retain 1 Month
- ☐ Permanent (Author Receives listing every 2 mos.)

Other ____________

DISTRIBUTION: ☐ Yes	**COPIES:**

Special Instructions:

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OFFICE USE ONLY:	Job #	Pages:	Operator:	Distributor:	Document #

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this area. There are ways to temporarily acquire equipment or gain access to it. The important thing is that Legal Secretarial students are familiar with such systems or unafraid to learn them should they find themselves in modern legal offices. The instructor who wishes to develop a more comprehensive approach to word processing in the legal office should consult the Word Processing Supplement to the California Business Education Program Guide.

B. Even though there may be no word processing or time-share equipment in the classroom or skills center, it is still possible to offer instruction in this module through demonstration. One alternative is to visit an automated legal office to observe how applications are put into actual practice. A second alternative is to ask vendors to loan the class equipment for a short period of time. This is frequently done, it gives students some opportunity to try new skills, and it is definitely to the advantage of the vendor to acquaint students with the products they may one day help purchase. Points to stress to students during demonstrations would include the following:

1) General understanding of the keyboard with video display screen
2) General understanding of the operation of the printer
3) Basic operating procedures for the printer
4) Getting to the main screen
5) Accessing information through passwords
6) Types of programs available and demonstration of a representative sample

C. Learning to use the equipment will probably include most or all of the following, depending upon the complexity of the equipment:

1) Typewriter adjustments
2) Typing in memory
3) Exercises in typing in memory
   a) Playing back what is in memory
   b) Using code button
   c) Clearing memory
   d) Typing and playing back with memory
4) Error correction
   a) Line return
   b) Exercises--using line return to correct errors
   c) Line delete to correct errors
   d) Adding material

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  - e) Deleting carrier returns
  - f) Deleting accidental carrier returns
  - g) Paragraph and line advance
- 5) Storage
  - a) Special typing instructions
    - 1) Hyphenating during playback
    - 2) Hyphens and dashes
    - 3) Exercises--typing hyphens and dashes
  - b) Centering
  - c) Required space
  - d) Required backspace
  - e) Required carrier return
- 6) Special instructions
  - a) Required tab
  - b) Repeat
  - c) Decimal tab
  - d) Paragraph indent
- 7) Multiple-page projects
  - a) Typing and storing a multiple-page project
  - b) Playing back a multiple-page project
  - c) Changing a multiple-page project
  - d) Making changes and playing back from a specific page
- 8) Tables and columnar projects
  - a) Typing a columnar project
  - b) Typing a project with column headings
  - c) Typing tables with text paragraphs
  - d) Typing and playing back a project with manual tabs
  - e) Changing tables and columnar projects
  - f) Typing statistical tables
  - g) Centering column headings with dec tab (decimal tabulator) settings
  - h) Typing a statistical table with text column
  - i) Changing statistical tables
  - j) Changing statistical material
- 9) Underscoring
- 10) Stop instructions
- 11) Paragraph advancing

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12) Storing procedures
    a) Exercises--typing, playing back, and storing a project
    b) Batch storing
    c) Playback from storage
    d) Changing stored material
    e) Exercises--changing a stored project
    f) Exercises--combining and separating paragraphs
    g) Batch playback
    h) Storage lock lever
    i) Lights
13) Format changes
    a) Line space lever
    b) Left margin stop
    c) Line length
    d) Tab settings
    e) Type size--exercise in changing type size
14) Memory capacity
    a) Typing a project
    b) Making an addition
15) Typing without memory
16) Preparing envelopes

Word processing instructors generally agree that very good operators, or students who become good operators, generally have a love of equipment and an intense curiosity. That is not to say that others cannot become skillful or that instructors cannot encourage that kind of enthusiasm and curiosity.

D. In the course of learning how to operate the various automated typing systems which are available to them, students will turn to the machine manuals in many cases to solve operational problems. The instructor is encouraged to let students try to learn the systems by following the manuals, as this is excellent practice in following complex written instructions. Likewise, if instructors establish a simulated legal office in the class, students will acquire valuable experience as they process legal documents on the equipment. Any of the forms found in this supplement, or any additional forms which can be obtained from local legal offices, can and should be used for simulated practice.

Number	Instructional Ideas
	E. Invite an Office Manager or Legal Secretary from a local legal office to discuss his/her experiences with a modern legal office. If possible, find an individual who has experience in both kinds of offices--those with and those without equipment. Ask the individual to discuss with students the practical side of the modern legal office (increased efficiency, etc.) and his/her personal response to these kinds of changes.
	F. For those classroom or training situations where there is no word processing or time-share equipment, ask students to prepare a brief report on the modern legal office. Those students who are able to cite types of equipment and applications may be considered to know the material satisfactorily. This approach has the additional advantage of allowing the instructor to evaluate students' written language. If the student needs to further develop writing skills, the instructor can suggest ways to go about this.
1203.03.01	The primary goal of this module is to develop students' transcription skills. A pretest will serve as a diagnostic measure to determine what skills students already possess, if there are any faulty habits which might be corrected, and what exercises would be best suited to further skills development. Commercial pretests are readily available, or instructors might wish to make their own tapes.

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1203.03.02 The following is a simple matching pretest to determine a student's knowledge of the concepts suggested for this module. Students will choose the definition on the right which best matches the item on the left and write the identifying letter in the space provided.

1. Intercom and telephone recording ____
2. LEDs ____
3. Portable recording models ____
4. Transcribing machines ____
5. Two-track tape systems ____
6. Voice-operated relays (VORs) ____
7. Magnetic Media ____
8. Automatic measured review ____
9. Central recording systems ____
10. Desktop recording systems ____
11. Discrete media ____
12. Electronic cueing ____
13. Endless-loop media ____

A. Made machine dictation more convenient and more popular because it can be reused and corrections made easily. Examples currently used are cassettes, belts, and discs.
B. A major media classification that is very popular in offices because the media can be easily removed from the machine and mailed or given to a transcriptionist for processing.
C. Dictation and transcription can take place simultaneously, but lengthy documents cannot be easily distributed to several transcriptionists unless a multiple station system is used.
D. Are always ready to receive dictation and are practical for people who spend a great deal of time dictating or must dictate lengthy documents.
E. Are typically used by principals who must dictate in remote locations.
F. A number of principals can input dictation into the system by using either their telephones or specially wired microphones.
G. Equipment components consist of a headset and foot pedal or thumb control.
H. Replaces the use of an index strip for marking the length of letters and special instructions.
I. Electronically displayed light which indicates the length of letters and also eliminates the use of index strips.
J. Enables the originator to insert special instructions or additional dictation at any place in the dictation.
K. Allows the originator to speak to the transcriptionist via the dictation machine or to call the office and record a message on the dictation machine.

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L. Close up the silent space on a recording, making a continuous flow of dictation.

M. Allows the machine to back up nine spaces or less and the originator or transcriptionist does not have to rewind to hear previously dictated words

Answers: 1K; 2I; 3E; 4G; 5J; 6L; 7A; 8M; 9F; 10D; 11B; 12H; 13C.

1203.04.01 The same procedure applies to the posttest as to the pretest in 1305.03.01. Entry-level dictation/transcription competency is considered by industry to be three full pages (54 lines per page) of final copy per hour.

1203.05.01 Consult Appendix A for a selected list of available resources which apply to this module. The list is nontaxative, and the instructor is encouraged to use this as a point of departure toward the identification of other resources.

1203.05.02 The Thursday, March 6, 1980, edition of The Los Angeles Daily Journal contained an excellent article entitled "Word Processing Systems: Meeting Lawyers' Needs" by Katherine R. Novak (page 21).

1203.05.03 The June 1977 edition of DATAPRO contained an analysis entitled "Word Processing & Law Firms" (WP08-010-101-104). Write: DATAPRO Research Corporation; Delran, NJ 08075

Number	Condition	Performance	Standard
1204.01.01	Given discussion of and visits to the California courts system,	the student will be able to relate the system to the legal forms and documents which are prepared in the legal office	with 90% accuracy on a criterion-reference test.
1204.01.02	Given discussion of and possibly visits to the Federal courts system,	the student will be able to relate the system to the legal forms and documents which are prepared in the legal office	with 90% accuracy on a criterion-reference test.
1204.01.03	Given a variety of noncourt and court documents for preparation,	the student will prepare as many types of documents as instructional time and/or work experience allow	with 100% accuracy, as well as neatly and attractively.
1204.01.04	Given noncourt and court documents which have been properly and completely prepared,	the student will record the documents	with 100% accuracy, as well as neatly and attractively.

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GENERAL COMMENT:

The purpose of this module is to develop students' familiarity with legal forms and documents and to develop their skills, to the extent that time allows, in completing these documents. At the same time, instructors agree that when students understand how Legal Secretarial work relates to the courts systems, they find their work more meaningful and enjoyable. In addition, this kind of knowledge and awareness also tends to foster the student's sense of career development. For these reasons, two objectives have been included on the State and Federal Courts Systems. They are stated separately, but it is hoped that the instructor will present them in an integrated fashion with the other objectives which focus on forms, documents, and filing.

1204.02.01 The following material is usually presented in U.S. Government classes and will probably be familiar to students. However, many students "learned" it just long enough for a test and quickly forgot because it was never meaningful, never really related to something students were interested in. Instructors have found that if, during Legal Secretarial training, this kind of information is combined with visits to the courts and preparation of documents, etc., students can become enthusiastic learners of the courts systems. The following information and diagrams may be helpful. Additional resources are cited in 1204.05.01 for further reference.

A. There are two distinct court systems in the United States, the federal courts and the state courts. These two systems, Federal and State, are independent and equal within their respective spheres of jurisdiction.

Federal Courts

The federal court system has jurisdiction in all cases involving the U.S. Constitution, federal laws, and treaties. It is arranged in hierarchial fashion with the District Courts at the base, the Courts of Appeals at the intermediate level, and the Supreme Court at the top. The U.S. District Court is the court of first instance for the majority of suits arising under federal law. It is here that most cases involving national law are started and terminated. Appeals from the U.S. District Courts go directly to the U.S. Courts of Appeals which also hear cases from the U.S. Tax Court and from the rulings of certain independent regulatory agencies, such as the National Labor Relations Board and the Federal Communications Commission. A decision of a District Court may also be appealed to the U.S. Supreme Court under certain conditions. Only a comparatively few cases from the U.S. Courts of Apppeals or the District Courts are ever heard in the U.S. Supreme Court which as discretionary power over which cases it will accept. The Supreme Court has both original jurisdiction and appellate jurisdiction (review of decisions from lower courts). As the highest court in the

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United States, the Supreme Court has original jurisdiction over suits between two states concerning such issues as water rights, offshore lands, etc. and all cases affecting ambassadors, other public ministers and consuls. On all other cases it has appellate jurisdiction.

State Courts

The pattern of the state courts approximates that of the federal courts. At the base of the state hierarchial level are the minor courts, such as the municipal courts, the traffic courts, and the juvenile courts. Next in the hierarchy above these minor courts are the trial courts, known as district, circuit, or superior courts. The bulk of major litigation under state law originates here. Above the trial courts are the courts of appeals, corresponding to the U.S. Courts of Appeals, and then at the apex is the state supreme court which has the final authority on all questions of law originating within the state, except those involving the U.S. Constitution. A case which has gone as far as it can in the state courts can be appealed to the federal courts only if the question involves a matter of federal law or the U.S. Constitution. Such an appeal goes directly to the U.S. Supreme Court from the state.

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Figure 1204.1

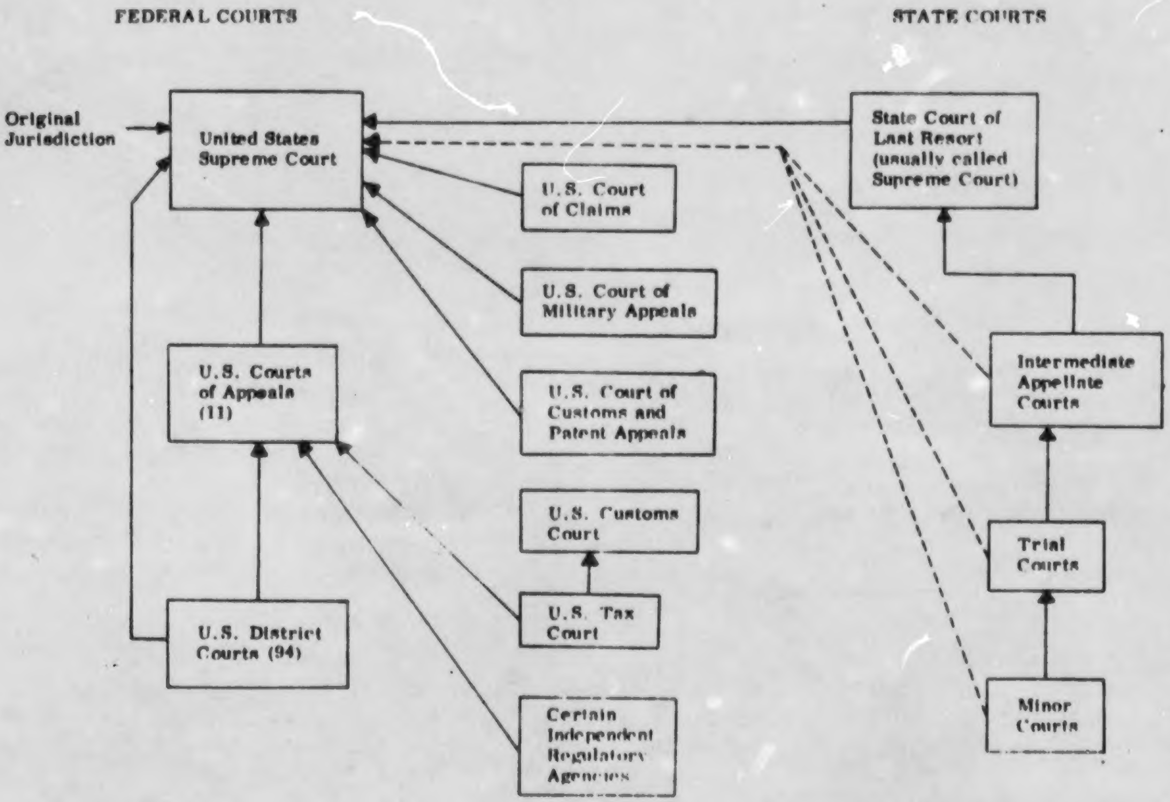
FEDERAL COURTS
STATE COURTS
Original Jurisdiction
United States Supreme Court
U.S. Court of Claims
U.S. Court of Military Appeals
U.S. Court of Customs and Patent Appeals
U.S. Customs Court
U.S. Tax Court
Certain Independent Regulatory Agencies
U.S. Courts of Appeals (11)
U.S. District Courts (94)
State Court of Last Resort (usually called Supreme Court)
Intermediate Appellate Courts
Trial Courts
Minor Courts

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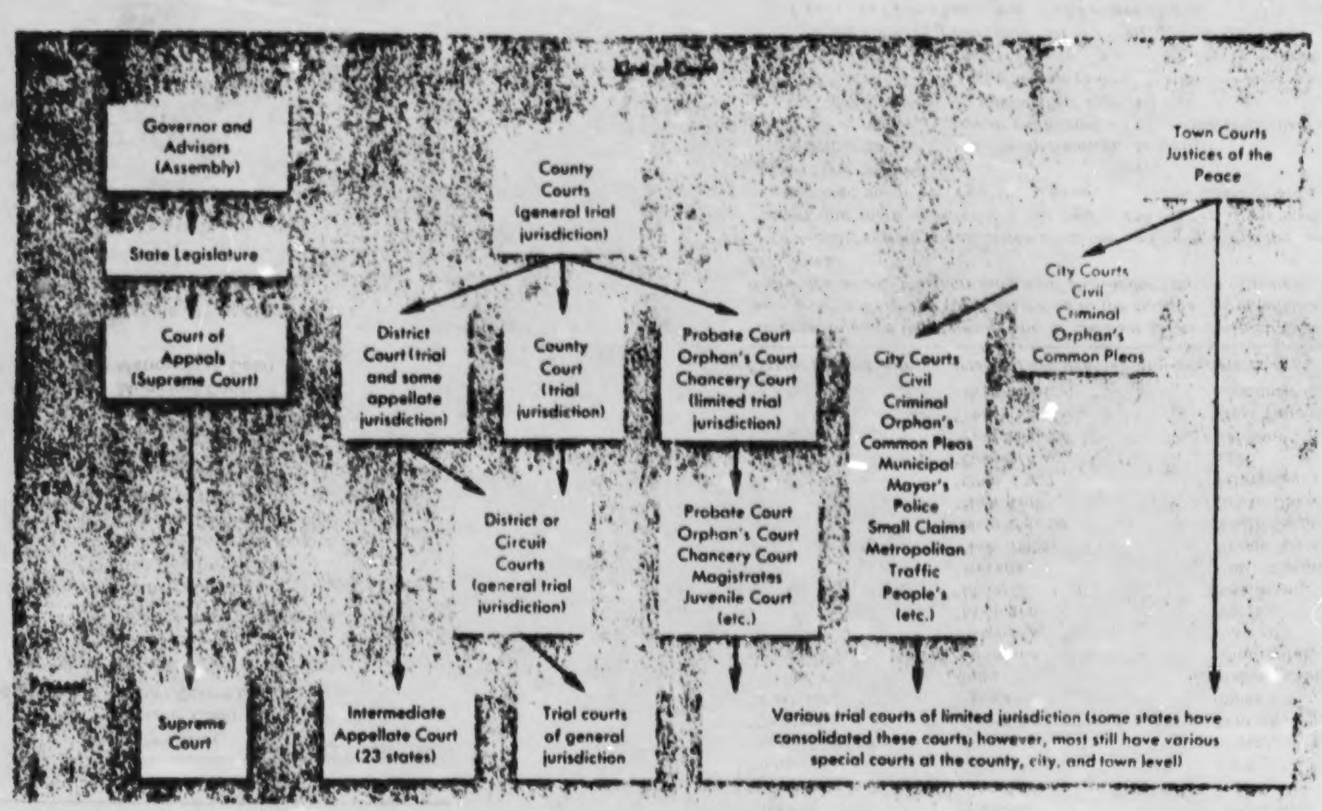
Figure 1204.2


Kind of Court
Governor and Advisors (Assembly)
State Legislature
Court of Appeals (Supreme Court)
County Courts (general trial jurisdiction)
District Court (trial and some appellate jurisdiction)
County Court (trial jurisdiction)
Probate Court Orphan's Court Chancery Court (limited trial jurisdiction)
Town Courts Justices of the Peace
City Courts Civil Criminal Orphan's Common Pleas
City Courts Civil Criminal Orphan's Common Pleas Municipal Mayor's Police Small Claims Metropolitan Traffic People's (etc.)
District or Circuit Courts (general trial jurisdiction)
Probate Court Orphan's Court Chancery Court Magistrates Juvenile Court (etc.)
Supreme Court
Intermediate Appellate Court (23 states)
Trial courts of general jurisdiction
Various trial courts of limited jurisdiction (some states have consolidated these courts; however, most still have various special courts at the county, city, and town level)

The evolution of state courts.

Number

Instructional Ideas

Table 1204.01

CONTRAST OF STATE COURT SYSTEMS

California	Florida
	Appellate Courts
Supreme Court	Supreme Court
District Courts of Appeals	District Courts of Appeals
	Trial Courts of General Jurisdiction
Superior Courts	Circuit Courts
	Court of Record (Escambia County only)
	Trial Courts of Limited Jurisdiction
Municipal Courts	Civil Court of Record
Justice Courts	Criminal Courts of Record
	Civil and Criminal Court of Record
	Courts of Record
	County Judges' Courts
	Juvenile and Domestic Relations Courts
	Small Claims Courts
	Justice Courts
	Municipal Courts
	Metropolitan Court

Table 1204.2

DIFFERENCES IN STATE COURT ORGANIZATION[a]

Simple and Modern ←		→ Complex and Traditional	
Group 1 *N* = 6	Group 2 *N* = 20	Group 3 *N* = 20	Group 4 *N* = 4
*Arizona	*Alabama	Connecticut	*Arkansas
*California	*Alaska	Idaho	Delaware
*Illinois	*Colorado	Iowa	Mississippi
*North Carolina	*Florida	Kansas	Virginia
*Oklahoma	*Georgia	Kentucky	
*Washington	Hawaii	Maine	
	*Indiana	Massachusetts	
	*Louisiana	Minnesota	
	*Maryland	Montana	
	*Michigan	Nebraska	
	*Missouri	New Hampshire	
	Nevada	North Dakota	
	*New Jersey	Rhode Island	
	*New Mexico	South Carolina	
	*New York	South Dakota	
	*Ohio	*Tennessee	
	*Oregon	Utah	
	*Pennsylvania	Vermont	
	*Texas	West Virginia	
	Wyoming	Wisconsin	

**States marked with an asterisk have intermediate appellate courts.*

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[a] *In order to place the states in one of the four groups distributed along the continuum, they were given a weighted score according to the specific characteristics of the court system. The higher the score, the more simplified and modern the court system. The score was computed as follows:*

A. A court system is considered simplified and modern if it has one intermediate appellate court, but more complex if it has two or more types of intermediate appellate courts. It is considered much less modern, however, if it has no intermediate appellate court. Therefore, each state received:

- *4 points for having one intermediate appellate court*
- *3 points for having two or more types of intermediate appellate courts*
- *0 points for having no intermediate appellate court*

B. The fewer types of trial courts of general jurisdiction which a state has, the more modern and simplified its court system is considered to be. Therefore, each state received:

- *2 points for having one trial court of general jurisdiction*
- *1 point for having two types of trial courts of general jurisdiction*
- *0 points for having more than two types of trial courts of general jurisdiction*

C. The fewer types of trial courts of limited jurisdiction which a state has, the more modern and simplified its court system is considered to be. Therefore, each state received:

- *3 points for having one trial court of limited jurisdiction*
- *2 points for having two types of trial courts of limited jurisdiction*
- *1 point for having three types of trial courts of limited jurisdiction*
- *0 points for having more than three types of trial courts of limited jurisdiction*

The score for each state is the sum of its scores in sections A, B, and C. Scores ranged from 1 to 9. The scores included in each group are: Group 1—7, 8, 9; Group 2—4, 5, 6; Group 3—2.3; Group 4—1.

Number Instructional Ideas

B. The judicial system of California is the largest in the United States, having in 1971 a total of 372 courts and 1,087 judges. Its total annual costs are about $250 million. About 12.5 million cases were heard in the year 1970-71. About 6.9 million of these cases involved parking violations, and the remainder, 5.6 million cases, were nonparking cases, though a good number of these cases also involved traffic violations.

The California Constitution provides that the judicial power of the State is vested in four levels of courts: municipal and justice courts, superior courts, appellate courts, and the Supreme Court of California. For a pictorial representation of the courts, see the chart on page 70. To describe the workload of the California courts, the Judicial Council has devised a weighted caseload system which recognizes the fact that various types of cases filed require varying amounts of judicial effort. This system is used in municipal, superior and appellate courts, but not in justice courts. For details as to the units applied in the various courts, see the Judicial Council of California, 1971 Annual Report to the Governor and the Legislature, January 4, 1971.

Municipal and Justice Courts

The lower courts in California are municipal and justice courts. Each county is divided into judicial districts by the board of supervisors. In districts of more than 40,000 people, there is a municipal court; in those with a lesser population, there is a justice court. At present, there are 77 municipal and 231 justice courts in the state. Although municipal court judges must be attorneys, justice court judges need not meet this requirement. Approximately 70 percent of the justice court judges are not attorneys at present. The jurisdiction of the municipal courts includes civil cases to $5,000, misdemeanor cases, preliminary examinations for felony cases, and small claims court (actions under $500). Justice courts hear civil cases involving $1,000 or less, misdemeanor cases with a fine of not over $1,000, or imprisonment of not over one year in jail.

Municipal and justice courts are financed by the county within which they are located, with the result that their manpower and physical resources vary widely, with each court as a separate entity. Municipal court judges' salaries are fixed by the Legislature and are currently $32,273 per year. The salaries of justice court judges, on the other hand, are set by the board of supervisors in the county and currently range from $3,000 to $24,000 per year.

Both municipal and justice court judges are elected by the voters of their district to six-year terms. Municipal court vacancies are filled by the Governor, while justice court vacancies are filled by the board of supervisors. Municipal court judges must be attorneys admitted to the Bar in California for at least five years immediately preceding election or appointment. Judges of justice courts must have been admitted to the Bar in California or have passed a qualifying examination given by the Judicial Council.

Superior Courts

The superior courts are the state's trial courts of general jurisdiction. Their jurisdiction is over all cases except those assigned by the Constitution and statutes to other courts, and includes appellate jurisdiction in cases coming from municipal and justice courts, original jurisdiction over civil suits over $5,000, actions in equity, domestic relations, felony trials (they can also hear felony preliminary hearings, but these are traditionally heard by lower courts), juvenile court proceedings, psychiatric commitments, adoptions, writs, probates, guardianships, and conservatorships.

For each of the 58 counties in California, there is one superior court with at least one judge. The number of judges in each county is established by the Legislature, which may require that very small counties share one judge; however, this is not the case at present. Even Alpine County, which has had a population of less than 500, has a superior court judge, although s/he only holds court in that county for a few days a year.

Approximately 95 percent of all superior court judges are appointed to their first term by the Governor, who fills vacancies occuring between elections. Every six years, the judges must run for re-election. They are required to be attorneys admitted to the practice of law in California for at least 10 years immediately prior to election or appointment.

Although the State pays the larger portion of superior court judges' salaries and their retirement, the major portion of the cost of operating superior courts is borne by the counties, which provides bailiffs, reporters, clerks, staff, buildings, and equipment. As a result, these resources vary considerably from county to county. In 1969-70, there were 416 superior court judges in California, with a total operating budget of $29.9 million; filings for this period totaled 508,432.

Number **Instructional Ideas**

Courts of Appeal

The courts of appeal are California's intermediate appellate courts. The courts of appeal have appellate jurisdiction when superior courts have original jurisdiction, and in certain other cases prescribed by statute.

The State is divided into five areas called districts, each district being divided into one or more divisions. There is a court of appeal for each district and division. The number of judges in each division is set by the Legislature and currently varies from three to five. Cases are decided by three-judge panels. Judges of the district courts are elected in uncontested elections for 12-year terms. They must have been attorneys admitted to the practice of law in California for at least 10 years immediately prior to election.

There were 48 appellate court judges in 1969-70, with a total operating budget of $5.2 million. Over 8,000 petitions and original proceedings were filed during this period.

Supreme Court

The Supreme Court, California's highest court, serves as the state's court of last resort. It has original jurisdiction in writs of habeas corpus mandamus, prohibition and certioari. It hears appeals on those cases in which the death penalty is imposed, and those determined by any of the several courts of appeal, or between courts of appeal. It has power to discipline judges upon recommendation of the Commission on Judicial Qualifications and attorneys upon recommendation of the State Bar of California.

The Supreme Court consists of a chief justice and six associate justices who sit en banc. Supreme Court justices are elected in the same manner as justices of the courts of appeal; any vacancies are filled by the Governor. They must either have been attorneys admitted to the practice of law for at least 10 years, or they must have been judges in a court of record.

Number Instructional Ideas

The Supreme Court had 3,400 new filings in 1969-70, of which 2,064 were petitions for hearing in cases decided by the courts of appeal.

Related Agencies

1. Judicial Council

The Judicial Council is the chief administrative body of the judiciary. The Council membership consists of the chief justice as chairman, one associate justice of the Supreme Court, three judges of the courts of appeal, five judges of the superior courts, three judges of the municipal courts, two judges of the justice courts, four attorneys, one state senator and one state assemblyman. The judges are appointed by the chief justice, the attorneys by the Board of Governors of the State Bar of California, and the Assembly and the Senate members by their respective legislative bodies.

The Council is required to make a survey of judicial business, make recommendations to the courts, and report annually to the Governor and the Legislature. The Council also adopts court rules of administration, practice, and procedure. The Council also performs other duties requested by the Legislature, and conducts orientation seminars for judges in new developments in the law. The Council chairman expedites the judicial business of the State, and equalizes the workloads of judges. To do this, the Constitution authorizes him to assign a judge from one court to another. Such assignment is mandatory, except that a judge of a higher court may only be assigned to a lower court with his/her consent.

2. Administrative Office of the Courts

The Administrative Office of the Courts is the staff agency of the Judicial Council. The Administrative Director and his staff prepare recommendations for improved court rules and needed court-related legislation for consideration by the Judicial Council, and upon Council approval of the latter, submit them to the Legislature; issue an annual report of judicial statistics; prepare reports concerning the need for new judicial positions; administer state funds appropriated for the judicial branch (primarily the appellate courts and the administrative office); organize workshops for the trial and appellate courts; and conduct management studies of the state judicial system.

Number Instructional Ideas

3. Commission on Judicial Qualifications

The Commission on Judicial Qualifications has the authority to investigate, hold hearings, and then recommend to the Supreme Court that a judge be removed, be retired, or be censured. The Commission consists of five judges appointed by the Supreme Court, two lawyers appointed by the State Bar, and two laymen appointed by the Governor. It deals with cases involving misconduct in office, failure to perform duties, or intemperance. In 1970, 181 complaints were filed against judges. Of these, 148 were closed without investigation as being outside the Commission's jurisdiction, and 33 were investigated, two of which were recommended to the Supreme Court for censure.

4. Commission on Judicial Appointments

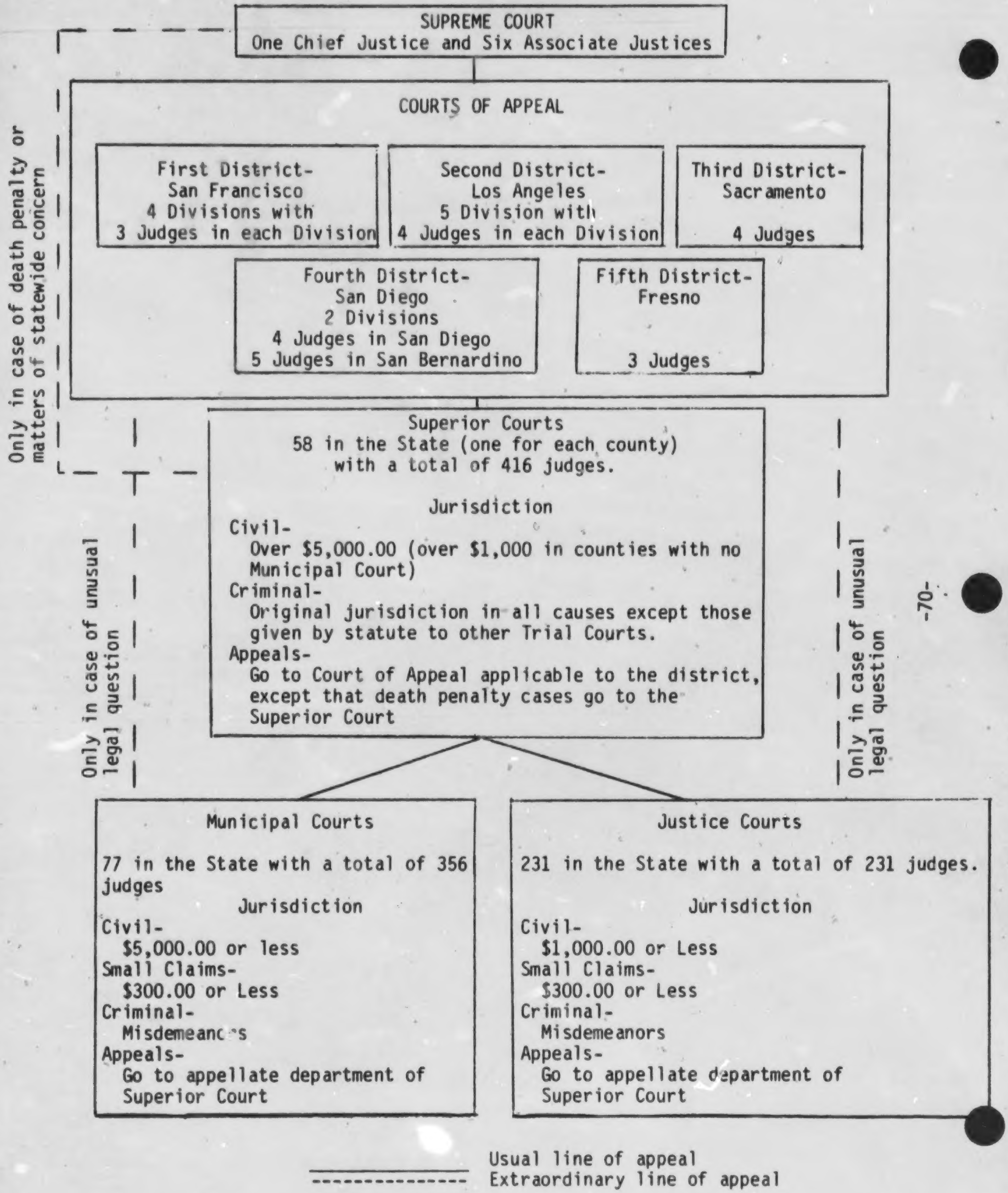
The Commission on Judicial Appointments has the power to veto nominees of the Governor for the appellate bench. The Commission consists of the Chief Justice, the Attorney General, and the senior presiding judge in the appellate district in which the appointment is being made. When a nominee for the Supreme Court is being considered, the senior presiding justice, statewide, of the District Court of Appeals becomes the third member. If the Commission feels from the written and oral evidence presented that further investigation is required, it may ask the State Bar for a formal investigation. No appellate appointment is final until the Commission has filed its approval with the Secretary of State.

5. State Bar of California

State Bar membership is compulsory for all attorneys who practice in California. It is part of the judicial branch, and is subject to the authority of the State Supreme Court in certain matters. Functions of the State Bar include investigating the conduct of Bar members and recommending action to the Supreme Court, representing the interest of the legal profession before the Legislature, and investigating and recommending judicial appointments to the Governor.

Figure 1204.3

CALIFORNIA COURT STRUCTURE
1972



SUPREME COURT
One Chief Justice and Six Associate Justices

COURTS OF APPEAL

First District-
San Francisco
4 Divisions with
3 Judges in each Division

Second District-
Los Angeles
5 Division with
4 Judges in each Division

Third District-
Sacramento
4 Judges

Fourth District-
San Diego
2 Divisions
4 Judges in San Diego
5 Judges in San Bernardino

Fifth District-
Fresno
3 Judges

Superior Courts
58 in the State (one for each county)
with a total of 416 judges.

Jurisdiction
Civil-
Over $5,000.00 (over $1,000 in counties with no Municipal Court)
Criminal-
Original jurisdiction in all causes except those given by statute to other Trial Courts.
Appeals-
Go to Court of Appeal applicable to the district, except that death penalty cases go to the Superior Court

Municipal Courts

77 in the State with a total of 356 judges

Jurisdiction
Civil-
$5,000.00 or less
Small Claims-
$300.00 or Less
Criminal-
Misdemeanors
Appeals-
Go to appellate department of Superior Court

Justice Courts

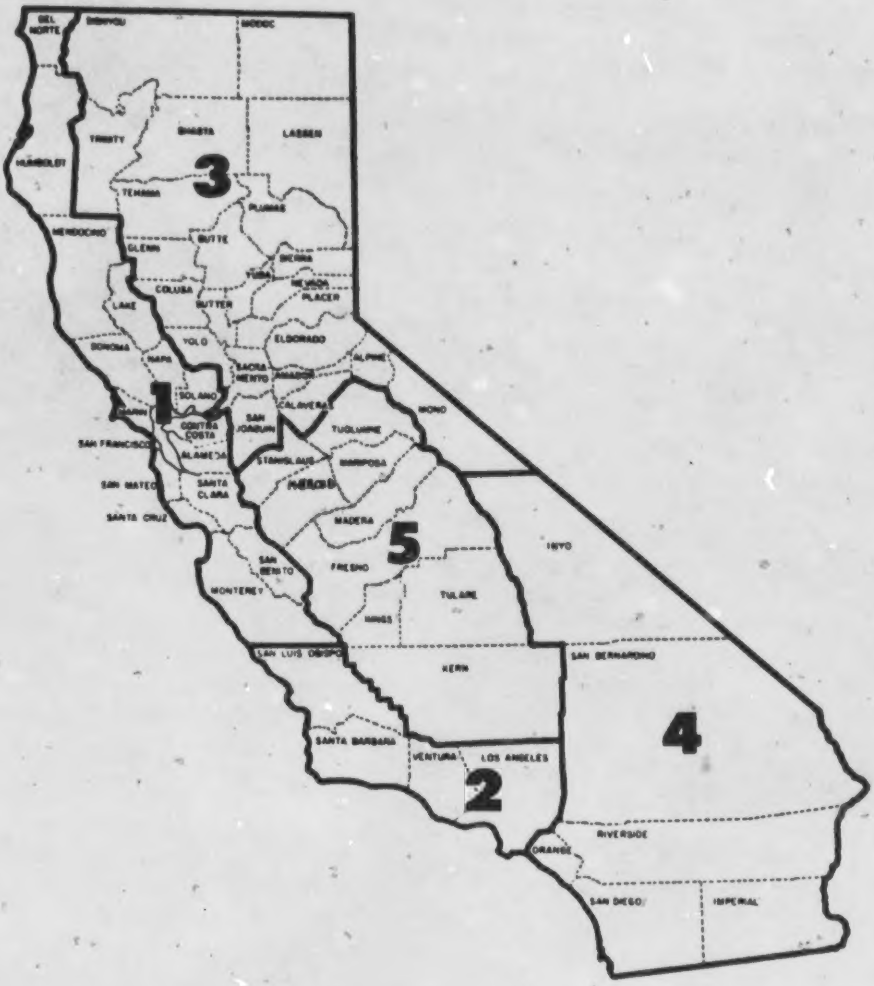
231 in the State with a total of 231 judges.

Jurisdiction
Civil-
$1,000.00 or Less
Small Claims-
$300.00 or Less
Criminal-
Misdemeanors
Appeals-
Go to appellate department of Superior Court

Only in case of death penalty or matters of statewide concern
Only in case of unusual legal question
Only in case of unusual legal question
Usual line of appeal
Extraordinary line of appeal

Number **Instructional Ideas**

Figures 1204.4



156

155

California appellate court districts

Number **Instructional Ideas**

1204.02.02 Students will learn that the difference between State and Federal Courts is largely jurisdiction. If diversity of citizenship, Federal Statutes, or the U.S. Constitution is involved, the Federal Courts have jurisdiction. Material presented in 1204.02.01 for contrast with the California State Courts System will be useful here.

1204.02.03 A. There are many legal forms and documents which a student might learn in Legal Secretarial training. As a point of reference, the Legal Secretarial Practice course at Vintage High School in Napa for high school seniors uses the textbook Legal Office Procedures by Bate and Casey. Students will usually complete one-tenth of the forms/documents over two semesters. It is not necessary to master every type of document available. However, students should have some experience in this area to feel comfortable with the work and be able to master new forms/documents easily. Sample representative forms are provided in 1204.05.02. These were available from local legal offices. The following is an analysis of the kinds of forms/documents Napa students prepared in legal offices as part of their work experience.

1. Pleading
2. Dissolution
3. Summons
4. Vital Statistics Record
5. Declaration of Homestead
6. Will
7. Agreement
8. Lease
9. Checks
10. Affidavit
11. Call-off
12. Motion for Disqualification
13. Promissory Note
14. Complaints
15. Petition for Divorce
16. Land Grant
17. Judgment
18. Quitclaim
19. Deed
20. Statement
21. Trial Brief
22. Mutual Release
23. Stipulation
24. Response
25. Waiver
26. Legal Custody
27. Order to Show Cause
28. Final Guardianship
29. Verification
30. Amendment to Complaint
31. Interrogatories
32. Authorization Letter for Personal Injury
33. Accident Report
34. Criminal Complaint
35. Partnership Manuscript
36. Deposition
37. Notice of Proof of Service
38. Request for Denial of Habeas Corpus
39. Memorandum of Points and Authorities
40. Request to Court to Take Judicial Notice
41. Insurance Claim
42. Application for Ex Parte Order
43. Order Restoring Wife's Former Name
44. Authorization for Release of Information

Number	Instructional Ideas
	45. Respondent's Answers to Interrogation 46. Order Assigning Salary or Wages 47. Juror Cards 48. County Clerk Form 49. Claims
	B. The amount of time required to complete legal forms and documents is naturally circumscribed by the length of the document, the availability of information, and similar considerations. The legal offices which provided each of the documents in 1204.05.02 identified the amount of time usually required for completion. This will be found in the left- or right-hand upper corner.
	C. Have students place completed forms and documents in their portofolios for use in the preparation of resumes and during job interviews.
1204.02.04	Both court and noncourt documents must be filed with the correct County, State, or Federal office to become "legal." For example, documents concerning transfer of title must be recorded in the official records of the county in which the property is located; corporation charters must be sent to the Secretary of State for certification; etc. Information which is filed becomes permanent record and is available to anyone who wishes to see it. A specified fee and a request for filing usually accompany the document. After the document is recorded, it is stamped, dated, signed, and returned, with the number of the record book and the page of the record book in which it has been entered noted on the document. Students should be able to prepare covering letters and conform all copies with the information supplied by the filing office. If students have work experience in local legal offices, they will frequently be assigned the task of filing documents. If students are not engaged in work experience, the instructor might want the class to visit local offices where documents are filed, simulating the filing process for students.

Number Instructional Ideas

1204.03.01 Pretest Directions for the Instructor: Take the items identified in Figure 1204.1 and write them in random order on the blackboard or overhead. Ask students to construct a diagram like 1204.1 which shows the relationships among these items.

1204.03.02 Pretest Directions: Using the sample Last Will and Testament or the Grant Deed in 1204.05.02 and the additional information supplied by the instructor, complete the document. (Allow approximately one hour for the will and five minutes for the Grand Deed.)

1204.04.01 Posttest Directions: Match the definitions in the column on the right with the items on the left.

_____ 1. Municipal courts
_____ 2. Justice courts
_____ 3. Superior courts
_____ 4. Courts of Appeal
_____ 5. Supreme Court
_____ 6. Judicial Council
_____ 7. Administrative Office of the Courts
_____ 8. District Attorney
_____ 9. City Attorney
_____ 10. Public Defender
_____ 11. Attorney General
_____ 12. Grand Jury
_____ 13. State Bar of California

a. California lower courts whose judges need not be attorneys.
b. Ensures the uniform interpretation and enforcement of the laws and represents the people of the State in all matters before the Appellate and Supreme Court of the United States.
c. Provides legal advice and prosecutes violations of ordinances.
d. Inquires into triable public offenses and investigates and reports on the condition and management of public prisons.
e. Defends indigents.
f. California's intermediate appellate courts.
g. Prepares recommendations for improved court rules and needed court-related legislation; issues an annual report of judicial statistics.
h. California's court of last resort; hears appeals on cases involving the death penalty.
i. Institutes investigations and prosecutes public offenses for one of the 58 counties.
j. Makes surveys of judicial business, recommendations to the courts, and reports annually to the Governor and the legislature.
k. The state's trial courts whose general jurisdiction is over all cases except those assigned by the Constitution and statutes to other courts.

Number Instructional Ideas

l. California lower courts whose judges must be attorneys.
m. Compulsory for all attorneys who practice in California and represents the interest of the legal profession before the Legislature.

Answers: 1. l; 2. a; 3. k; 4. f; 5. h; 6. j; 7. g; 8. i; 9. c; 10. e; 11. b; 13. d

1204.05.01 The following are general works on legal materials. Others are available from local libraries.

Abraham, Henry J. Judicial Process, 1962

American Assembly, Columbia University. The Courts, The Public and The Law Explosion, 1965

California Council on Criminal Justice. California Comprehensive Plan for Criminal Justice, 1972

Glick, Henry Robert and Vines, Kenneth. State Court Systems, 1973

Henke, Dan. California legal research handbook. Walnut Creek, Calif., Lex-Cal-Tex Press, 1971. (Ref KF 240 H4 - G.P.) A comprehensive reference resource tool for both California and federal legal materials. Lists both primary and secondary sources and legal research aids. Also includes a useful list of law libraries in California with hours and borrowing privileges.

Pollack, Ervin H. Pollack's fundamentals of legal research. 4th ed. by J. Myron Jacobstein and Roy M. Mersky. Mineola, N.Y., Foundation Press, 1973. (Ref KF 240 P6 1973 - Ref. area) Prepared primarily for the pre-law student. In addition to concise explanations and illustrations of legal research on case law, this volume contains, among other topics, a glossary of legal terminology used in case law, explanations of federal, state and municipal legislation, court procedure and international law.

Price, Miles and Harry Bitner. Effective legal research. New York, Augustus Kelley, 1969. (Ref KF 240 P7 - G.P.) A practical manual on law books and their use. A very helpful feature is Appendix VI, "Abbreviations commonly used in Anglo-American law."

Number — Instructional Ideas

1204.05.02 The forms and documents on the following pages were obtained from local legal offices. The instructor will usually find legal offices in his/her area glad to provide materials which can be used in the classroom. Each document has an estimated time for completion in the top left- or right-hand corner. The length of the Grant Deed has been shortened from 14" form to 11" for ease of printing. The samples include:

1. Grant Deed
2. Last Will and Testament
3. Subpena

The instructor is also advised to obtain the following Family Law Documents from local attorneys, as they are usually of interest to students:

Family Law Documents

- Summons
- Petition
- Response
- Income and Expense Declaration
- Notice of Motion
- Application for Order and Supporting Declaration
- Responsive Declaration to Order to Show Cause or Notice of Motion
- Order after Hearing
- Declaration under Uniform Custody of Minors Act
- Order to Show Cause and Declaration for Contempt
- Request to Enter Default
- Interlocutory Judgment of Dissolution of Marriage
- Request and Declaration for Final Judgment of Dissolution of Marriage
- Notice of Entry of Judgment
- Stipulation for Entry of Final Judgment of Dissolution
- Final Judgment

5 Minutes

RECORDING REQUESTED BY

AND WHEN RECORDED MAIL TO

Name
Street Address
City & State

SPACE ABOVE THIS LINE FOR RECORDER'S USE

MAIL TAX STATEMENTS TO

Name
Street Address
City & State

Grant Deed

D.T.T. $

TO 405 CA (9-68)

THIS FORM FURNISHED BY TITLE INSURANCE AND TRUST COMPANY

FOR A VALUABLE CONSIDERATION, receipt of which is hereby acknowledged,

hereby GRANT(S) to

the following described real property in the
County of , State of California:

Dated

STATE OF CALIFORNIA
COUNTY OF } SS.

On before me, the undersigned, a Notary Public in and for said State, personally appeared , known to me to be the person whose name subscribed to the within instrument and acknowledged that executed the same.
WITNESS my hand and official seal.

Signature

Name (Typed or Printed)

167

(This area for official notarial seal)

Title Order No. Escrow or Loan No.

MAIL TAX STATEMENTS AS DIRECTED ABOVE

-77-

ORIGINAL OF THIS WILL LOCATED IN THE SAFE OF MULKEY, AISTHORPE, KELLY & COOK,
ATTORNEYS AT LAW, 543 BROADWAY, CHICO, CALIFORNIA

1 Hour

LAST WILL AND TESTAMENT

OF

I,   , of Chico, Butte County, California, of adult years, being of sound and disposing mind and memory, and not acting under duress, menace, fraud or undue influence of any person or persons whomsoever, but of my own free will, do make, publish and declare this, my Last Will and Testament, in the manner following, that is to say:

FIRST: I hereby expressly revoke all former Wills or Codicils to Wills by me at any time made.

SECOND: I direct the personal representative of my estate hereinafter named, as soon as can lawfully and conveniently be done after my death, to pay and discharge my funeral expenses, expenses of my last illness, if any, and all of my just debts and liabilities, if any I leave.

THIRD: I hereby make the following recitals:

A. That I am married and that my wife's name is   , with whom I am presently residing in Chico, Butte County, California.

B. That I have two children the issue of my marriage to the said   , namely   an adult son, and   , an adult daughter.

FOURTH: I hereby confirm unto my wife, her undivided one-half interest in and to the community property of our marriage.

FIFTH: I hereby give, devise and bequeath My Entire Estate, whether the same consists of real, personal or mixed property, wheresoever situate and howsoever held by me at the time of my death, unto my wife,

SIXTH: If the said should predecease me or not be living within 30 days of the date of my death, then I make the following devises and bequests:

A. I hereby bequeath the sum of $3,000.00 unto each of my hereinafter named grandchildren who are living at the date of my death:

The specific sums of money heretofore bequeathed to my grandchildren shall be deposited in a federally insured savings and loan institution and held for each grandchild until that grandchild shall have attained the age of 24 years at which time the principal and all accrued interest shall be distributed to said grandchild.

I hereby nominate, constitute and appoint to be the guardian of the estate of my grandchildren, and , and I nominate, constitute and appoint to be the guardian of the estate of my grandchildren, , and for the purpose of effectuating the specific bequests to said grandchildren as hereinabove set forth.

B. I hereby give, devise and bequeath all the rest, residue and remainder of my estate to my son, and my daugher, , in equal shares; in the event that either or should predecease me or not be living within 30 days of the date of my death, then said deceased child's share shall pass to his or her lawful issue surviving him or her in equal shares.

SEVENTH: I hereby nominate, constitute and appoint my wife, , to be the executrix of this my Last Will and Testament, and further provide that she shall act in said capacity without the requirement of bond or other security. In the event that the said should predecease me or for any reason be unable to serve as my executrix, then I nominate, constitute and appoint my brother-in-law, , of Hayward, California, to serve as the executor of this my Last Will and Testament and further provide that he shall act in said capacity without the requirement or necessity of bond or other security.

EIGHTH: I have purposely made no provision herein for any other person, whether claiming to be an heir of mine or not, and if any person should claim to be an heir of mine and establish such relationship and as such should assert a claim to my estate, or any part thereof, by contest of this Will, by proceedings to determine heirship, or otherwsie, or should any person whether a beneficiary under this Will or not mentioned herein contest this Will or object to any of its provisions, then to such person or persons I hereby give and bequeath the sum of ONE DOLLAR ($1.00) and no more, in lieu of the provision which I have made or which I might have made herein for such person or persons.

IN WITNESS WHEREOF, I have hereunto set my hand this 28th day of December, 1979, at Chico, Butte County, California.

/s/

The foregoing instrument, consisting of four typewritten pages, including this page, was upon the day it bears date signed, published and declared by the said , the Testator therein named, as and for his Last Will and Testament in the presence of us, who at his request and in his presence and in the presence of each other, have signed the same as subscribing witnesses thereto.

/s/ residing at Chico, California.

/s/ residing at Chico, California.

5 Minutes

ATTORNEY OR PARTY WITHOUT ATTORNEY (NAME AND ADDRESS) TELEPHONE NO ATTORNEY FOR (Name)	FOR COURT USE ONLY
Insert name of court, judicial district or branch court, if any, and post office and street address	
PLAINTIFF	
DEFENDANT	
SUBPENA ☐ **DUCES TECUM** ☐ **COURT** ☐ **DEPOSITION** ☐ **OTHER (Specify):**	CASE NUMBER

THE PEOPLE OF THE STATE OF CALIFORNIA, TO (Name)

1. Unless you make a special agreement with the person requesting this subpena (See item 5), **YOU ARE ORDERED TO APPEAR** in this action as follows

a Date	Time	☐ Dept	☐ Div	☐ Room
b Address				

c ☐ and you are ordered to produce the records described in the accompanying affidavit

2 a ☐ You are ordered to appear in person
b ☐ You are not required to appear in person if you comply with Evidence Code sections 1560 and 1561

3 ☐ The personal attendance of the custodian or other qualified witness and the production of the original records is required by this subpena. The procedure authorized pursuant to sections 1560(b), 1561 and 1562 of the Evidence Code will not be deemed sufficient compliance with this subpena

4 ☐ You are ordered to appear in your capacity as a peace officer or other person described in Government Code section 68097.1. (Item 6 must be endorsed by the clerk of the court.)

5. **CONTACT THE ATTORNEY REQUESTING THIS SUBPENA, LISTED ABOVE, OR THE PERSON WHOSE NAME APPEARS BELOW, BEFORE THE DATE ON WHICH YOU ARE REQUIRED TO APPEAR, IF YOU HAVE ANY QUESTION ABOUT THE TIME OR DATE FOR YOU TO APPEAR, OR IF YOU WANT TO BE CERTAIN THAT YOUR PRESENCE IS REQUIRED.**

a Name b Telephone No

DISOBEDIENCE OF THIS SUBPENA MAY BE PUNISHED AS CONTEMPT BY THIS COURT. YOU WILL ALSO BE LIABLE FOR THE SUM OF FIVE HUNDRED DOLLARS AND ALL DAMAGES RESULTING FROM YOUR FAILURE TO OBEY

(SEAL)

SUPERIOR COURT BUTTE COUNTY, CAL.

Dated Clerk, By Deputy

6. Endorsed for service in a civil matter on a peace officer or other person described in Government Code section 68097.1

Dated 172 Clerk, By Deputy

Form Adopted by Rule 982
[illegible] of California

(See reverse for proof of service)

SUBPENA

CCP 1985-1997; Evid C 1560-1566

PROOF OF SERVICE OF SUBPENA

1. I served a copy of this ☐ subpena ☐ subpena duces tecum and affidavit in support thereof, personally upon each of the following persons

a. Person served (Name):
   (1) Address
   (2) Date and time of delivery
   (3) ☐ Fees paid $ ☐ Fees not demanded
   (4) Fees for service $

b. Person served (Name)
   (1) Address
   (2) Date and time of delivery
   (3) ☐ Fees paid $ ☐ Fees not demanded
   (4) Fees for service $

c. Person served (Name):
   (1) Address
   (2) Date and time of delivery
   (3) ☐ Fees paid $ ☐ Fees not demanded
   (4) Fees for service $

d. Person served (Name):
   (1) Address
   (2) Date and time of delivery
   (3) ☐ Fees paid $ ☐ Fees not demanded
   (4) Fees for service $

2. I received this subpena on (Date):

3. Person serving

a. ☐ Not a registered California process server
b. ☐ Registered California process server
c. ☐ Exempt from registration under Bus & Prof Code 22350(b).
d. ☐ California sheriff, marshal, or constable

e. Name, address and telephone number, and if applicable, county of registration and number.

I declare under penalty of perjury that the foregoing is true and correct and that this declaration is executed on
(Date):
at (Place):
California

(Signature)

(For California sheriff, marshal, or constable use only)
I certify that the foregoing is true and correct and that this certificate is executed on (Date)
at (Place):
California

(Signature)

A declaration under penalty of perjury must be signed in California or in a state that authorizes use of a declaration in place of an affidavit; otherwise an affidavit is required.

Number	Condition	Performance	Standard
1205.01.01	Given a number of clients,	students will be able to establish a numerical filing system	so that client files are easily retrievable by everyone in the office who has access to them.
1205.01.02	Given a number of clients,	the student will be able to establish an alphabetical file of index cards to cross-reference the numerical files	with 100% accuracy.
1205.01.03	Given a number of new clients,	students will be able to establish accounting cards	for 100% accurate billings.
1205.01.04	Given a number of new clients,	students will be able to assemble case folders	with 100% accuracy, according to the standards set in the classroom and/or those used in the legal office where the student is obtaining work experience.
1205.01.05	Given a number of former clients,	the student will be able to close their files	with 100% accuracy, according to the standards set in the classroom and/or those used in the legal office where the student is obtaining work experience.
1205.01.06	Given a variety of tasks to be accomplished during the month or year,	the student will be able to establish and effectively use a tickler file	with 100% accuracy so that no deadlines are missed, no supplies go unordered, and the like.

Number	Condition	Performance	Standard
1205.01.07	Given records related to the financial business of the law office or its proper maintenance,	the student will be able to establish and maintain fiscal and office maintenance files	to the satisfaction of the instructor and/or the work experience supervisor.
1205.01.08	Given files which are inefficiently organized,	the student will be able to reorganize files	so that all records are easily retrievable by everyone in the office who has access to them.
1205.01.09	Given new pages for law books,	the students will insert the pages	accurately, returning the law books to their proper places on the shelf.

Number	Instructional Ideas
1205.02.01	Legal client files are generally arranged numerically in the order in which individuals become clients. A separate control file is arranged alphabetically, and this will be discussed in 1205.02.02. If outside work is being done by the class, individual jobs can be tagged numerically and cross-referenced alphabetically, just as a legal office would do. Instructors could also set up student files in the same way, and students would gain experience by both filing in their own folders and working with the folders of former students in ways to be suggested in Module 1212.
1205.02.02	Client files are cross-referenced with index cards which are arranged alphabetically. Alphabetical filing is covered thoroughly in both the Common Core and the Office Core of the California Business Education Program Guide. Objectives and instructional strategies can be found there. In addition, if the instructor uses the strategies suggested in 1205.02.01 above, then an alphabetic control file will also be needed. (NOTE: There are other methods besides numerical and alphabetical filing. It is a good idea to show students other options, particularly subject filing with cross-referencing, so that they do not expect to find just one approach).
1205.02.03	New clients will mean the preparation of fresh folders. The following may be helpful in assisting students to develop careful office habits which produce accurate and attractive work:

INSTRUCTIONS FOR ATTACHING FILE LABELS

You are not ready to do this job if you have not gone through the typewriter instructions booklet and used the machine. See the instructor for a title to put on the label. Wash your hands so you will not get dirt under the tape to be placed on the folder tabs.

A. Gather equipment from your supervisor.*
    1. Bottle with sponge top.
    2. Plastic sheet from a used stencil.
    3. Green labels.
    4. Folders. Be sure to use new folders, not the used ones. Also be sure to use the correct position as indicated on your half sheet of label titles. The new folders are all 1/3 cut (tab goes 1/3 of the way across folder), but they come in first, second, and third positions. First position folders become third position folders when turned inside out, and vice versa.
    5. Permanent mending tape.
    6. Scrap paper.

*NOTE: This class utilized students as supervisors. Each student mastered a specific task, and as other students came to perform that task, s/he would supervise the learning. In this way, everyone had the opportunity to gain some supervisorial practice.

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B. Plan and inspect.
   1. Inspect the file to see how the folder you prepare will be used. Look at the typical folders tabs in the file which have second lines and which have continued lines. Also inspect the sample folder which you can secure from your supervisor.
   2. Arrange your work on a plastic-top desk.
   3. Before you begin typing, check the machine to be sure that the lower left dial is at 5 and the upper right setting is at A. (This was developed for an IBM Executive Model).
   4. Notice that all capitals, without the expand key, are used for the first line or main title. All titles, short or long, begin at the same place.
   5. Let the roll of labels rest on your typewriters, as instructed on the box.
   6. If the title is too long for the label and must continue on a second line, indent the second line 5 strokes on the 2-unit space bar.
   7. Second and third lines, or subtitles, are upper and lower case letters. (Continuation of 1st lines, however, are all caps).
   8. The first line is typed one space down from the scoring on the label, not from the perforation. Practice this on scrap paper marked like the label. If your placement is not exactly like the sample, consult with the supervisor or the instructor before typing the label. Do not spoil labels. Use the 2-unit space bar when spacing between words.
   9. The lines begin two strokes, on the 2-unit space bar, from the left edge of the label.
   10. Notice that the handwritten title on the half-sheet that was given to you may not represent how much of the title you will get onto one line. Fill the space available.
   11. Do not type "1st," "2nd," or "3rd" on the label, from the half sheet you were given. The number indicates the tab position on the folder you will prepare. Type only the word or words in capitals.

C. Typing and attaching. If you spoil a folder give it to instructor for a scrap folder.
   1. Type the title on the label. Show to the instructor, along with the sample folder, before proceeding further.
   2. Cut the labels apart at the perforation.
   3. Crease your label sharply at the scored line.
   4. Place label, typed side down, on the piece of plastic. Have a sheet of clean paper handy.
   5. Wet thoroughly with sponge-top bottle.
   6. Hold the folder in a vertical position. Touch the top edge of the file tab to the crease of the wet label.

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7. Move to dry place, and lower the folder to the desk, so you will be able to press the two halves of the label firmly against the folder tab, front and back. Place a clean sheet of paper over the label and rub to smooth out any wrinkles. Smooth very firmly.
8. Check to see that all the corners are glued firmly to the paper, no edges are loose, and there are no bubbles or unstuck places. If any edges or corners are loose, wet the corner of a paper towel and slip it under the edge and press down to dampen the label more thoroughly.
9. Show to the instructor before proceeding.
10. Check with a ruler so you are reminded how wide 1/8 of an inch is before you attached the permanent mending tape.
11. Tear off a piece of permanent mending tape exactly long enough to cover the entire label and the entire tab of the folder, including the slanting ends.
12. Place the permanent mending tape on the front side of the tab, leaving enough above the top to turn it over the back about 1/4 inch.
13. Fold the top down hard against the top edge, leaving no loop of tape at the top.
14. Rub with thumb nail thoroughly, so tape adheres completely. Hold up to light, being sure there are not tiny dark and light gray effects which indicate air spaces under the tape. Rub it down completely.
15. Place the same length of tape on the back side of the tab, overlapping the tape you brought over from the front, but not reaching to the top edge of the tab.
16. Rub with thumb nail firmly so the tape adheres completely.
17. Trim the edges of the mending tape and the label to match exactly the edges of the tab. Get small scissors from instructor for this.

D. Completing the job
1. Fold the folder at the first scoring from the folded edge, if the scoring is approximately 1/2-inch wide, but at the second if the scoring is approximately 1/4-inch wide. This is done so the folder will stand squarely in the file, and so materials will not work themselves up and out of the folder. Then fold back to the original fold to hand the folder in.
2. Hand in your half sheet showing your title, along with your finished folder.
3. Put all in a scrap folder.

Number	Instructional Ideas
	E. Let the supervisor know when you hand in your completed job, so another person can be started on this job immediately. Note: If you are asked to supervise this job, you should do these things: 1. Notify the instructor when the last box or roll of supplies of any one kind is started. 2. Help students follow the duplicated instructions. 3. Conserve supplies by taking care of them and helping students avoid spoiling them. 4. Keep account of the folders. Record on your list of students assigned to this job, how many labels and folders each student used. Give spoiled folders to instructor for scrap folders.
1205.02.04	Although standard manila folders are used for many records, special legal file folders or case folders may also be used for client records. These contain all the information pertaining to a specific legal matter. All documents, correspondece, evidence, and notes are bound into the folder and held in place with a fastener. Case folders are generally thicker than ordinary manila folders because they are handled frequently. To give students practice in assembling case folders, the instructor may wish to have students treat the class files or a portion of them as they would case folders in a legal office (i.e., two-hole punch at the top of the paper, fastener, a certain order to the contents of the folder).
1205.02.05	The same strategy of using classroom files to simulate those in a legal office might apply to closed files, the files containing legal matter which has been concluded. In this case, the files of former students might become the closed files. If the instructor follows the strategies outlined in Module 1212 on employability, current students will be referring to these "closed files" during the year. Closing the files might be a terminal filing activity for the current class at the end of their training. They will mark their own files closed, assign them numbers, place them alphabetically in storage files, and code the master list. The following class will have to refer to the master list to find the correct files. Once established, the system can be easily maintained year to year.
1205.02.06	Tickler files help the Legal Secretary remember important dates and deadlines. It is really a kind of calendar which allows for easy manipulation of the contents. One instructional strategy is to have each student develop an individual tickler file. Assign several tasks to be completed by each student during the coming month (or any other time period). The instructor should keep a master list of tasks for evaluating how well each student uses the file. Periodically check to see that students are completing their tasks on time. If done early in the instructional period, the tickler file can be used throughout the course, and students may even voluntarily use it for their own personal obligations and deadlines.

Number	Instructional Ideas
1205.02.07	Financial records will be covered more thoroughly in Module 1209. For the time being, it is only important that students see that additional files can be kept on financial matters, office maintenance, and the like. The instructor might keep all matters related to classroom finance and maintenance available for demonstration, perhaps filing it differently (i.e., color-coded, alpha-numeric, subject) to illustrate other techniques. Periodically the instructor might ask a student or small group of students to help complete a report using the material in these files, to calculate expenditures to date on classroom supplies, etc.
1205.02.08	Periodically students assigned to work experience will be asked to help reorganize files. More important, new Legal Secretaries, especially those in small offices, may find that reorganization of files would make work more efficient. In this case, students have learned all the technical skills they need to reorganize files if they have mastered all the preceding objectives. The important point to stress here will be the interpersonal skill needed to suggest reorganization to the attorney or other appropriate individual. Role-playing should suffice to make students aware of proper handling of this kind of situation.
1205.02.09	Replacing new pages in law books is a type of filing activity and one which work experience students in particular are likely to be asked to do at first. One approach is to make New Pages in Law Books a lab job to be completed at some point in the instructional cycle. Module 1211 contains a list of lab jobs which the instructor might wish to adapt to include this objective. The task itself is not difficult, but students must be taught not to take it for granted. Instructors have found that work experience students or new Legal Secretaries are often judged initially by the way they complete simple assignments. If students treat such tasks cavalierly or fail to do them carefully, the employer forms the wrong opinion of an otherwise skilled individual.

Number	Instructional Ideas
1205.03.01	Pretest Directions: Using a Gregg Filing Awards Test or test taken from some other resource, complete the test with 100% accuracy. (Students who complete the test with 100% accuracy can skip this module.)
1205.03.02	Pretest Directions to the Instructor: Using a telephone directory, develop a filing test for students. This method is not nearly as difficult as a Gregg Filing Awards Test, for example, but filing in a legal office is usually not that complicated either.
1205.04.01	Posttest Directions to the Instructor: Any of the strategies in the 1205.02.00 section can serve as a posttest. For example, the instructor can assign the case folder, the closed file, or the tickler file. If any of these is completed to the instructor's satisfaction and the student's filing is satisfactory otherwise, the student can be considered to have mastered the module.
1205.04.02	Two possible resources are cited below. Others are available from the local library or bookstore.
	The Lawyer's Secretary, 4th ed., Practicing Law Institute, New York, 1972, Chap. 21.
	Miller, Besse M., The Legal Secretary's Complete Handbook, 2nd ed., Prentice-Hall, Inc., Englewood Cliffs, NJ, 1970, Chap. 7.

Number	Condition	Performance	Standard
1206.01.01	Given incoming telephone calls by clients, vendors, and others,	the student will answer the telephone	professionally, to the satisfaction of the instructor and/or the work experience supervisor.
1206.01.02	Given telephone calls where information is received,	the student will take clear and satisfactorily comprehensive messages	to the instructor's and/or work experience supervisor's satisfaction.
1206.01.03	Given incoming calls for the attorney,	the student will screen the calls according to established procedures	to the instructor's and/or work experience supervisor's satisfaction.
1206.01.04	Given clients in person or on the telephone who wish to see an attorney,	the student will schedule appointments	with 100% accuracy, according to established office procedure.
1206.01.05	Given clients in person or on the telephone who wish to cancel appointments with the attorney,	the student will cancel appointments	with 100% accuracy, according to established office procedure.
1206.01.06	Given clients entering the office,	the student will greet them and introduce them to the attorney if they are new	to the instructor's and/or work experience supervisor's satisfaction.
1206.01.07	Given a legal office which employs a telephone switchboard,	the student will be able to operate the switchboard	for the smooth transmission of incoming calls according to established procedures.

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GENERAL COMMENT:

Legal practices are built on client contact, and the Legal Secretary is an important contributor to the impression a client forms of a legal office. Therefore, this module emphasizes student understanding of clients, colleagues, and him/herself. The Task Force hopes that the instructor will refer to interpersonal relations throughout the course, as students put to practice what they learn in concept. An alternative is to teach the objectives and instructional ideas related to interpersonal relations in conjunction with the other skills. In either case, interpersonal relations are crucial to the student's employment success. It is an area that we as educators often do not stress enough, and the Task Force hopes that Legal Secretarial instructors will consider devoting more attention to this area.

1206.02.01 A. The telephone is a lifeline in the legal office. A significant amount of client contact and legal work occurs over the telephone. It is important that students learn effective telephone techniques and use them always. For example, even a simple thing like indicating whether it is Miss, Mrs., or Ms. makes calling back easier. The conversations suggested in 1206.05.01 can be used with make-believe telephones. Observe each student carefully or have students observe one another and apply the following checklist of skills to each student's ability to handle incoming calls effectively.

EVALUATION FORM - LEGAL OFFICE SITUATIONS*
Person Answering a Call
Beginning of the Call
1) Answered promptly and pleasantly.
2) Gave proper identification.

Development of the Call
3) Was attentive; displayed personal interest.
4) Used good judgment in deciding how to handle the situation.
5) Was alert to opportunities to be of assistance (transfer, call-back, message).
6) Volunteered helpful information.
7) Gave explanations effectively.
8) Made inquiries tactfully.
9) Was prepared to take a message.
10) Recorded necessary information carefully.

*Taken from the Bell Telephone Company's training materials which accompany the teletrainer.

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11) Verified information (spelling, figures, etc.).
12) Used proper techniques when necessary to leave the line. Reported back very frequently.

Closing of the Call
13) Left a pleasing impression at the close of the call.
14) Was certain that the conversation had been completed before replacing the receiver.

Voice Personality
15) Spoke distinctly, directly into the mouthpiece.
16) Used correct grammar; avoided using slang.
17) Injected polite expressions (please, thank you).
18) Reflected a friendly, sincere manner.
19) Acted with poise and confidence.
20) Gave the caller a feeling of assurance.
21) Represented the business courteously and efficiently.

B. The student will also be expected to make many outgoing calls for the attorney. The same strategy applies with the following checklist.

EVALUATION FORM - LEGAL OFFICE SITUATIONS*
Person Making a Business Call
Beginning of the Call
1) Verified the telephone number before calling.
2) Dialed carefully after hearing dial tone.
3) Allowed sufficient ringing time.
4) Gave identification promptly.

Development of the Call
5) Had anticipated points to be covered and was prepared with necessary references.
6) Explained the nature of the call clearly and concisely.
7) Gave information to be recorded slowly and distinctly.
8) Confirmed information to assure mutual understanding.
9) Expressed appreciation.
10) Accomplished the purpose of the tall.

*Taken from the Bell Telephone Company's training materials which accompany the teletrainer.

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Closing of the Call
11) Directed the conversation to a close in a prompt, yet tactful manner.
12) Replaced the receiver gently after closing remarks.

Voice Personality
13) Spoke directly into the mouthpiece, in a distinct voice.
14) Used correct grammar; avoided using slang.
15) Was courteous.
16) Created a pleasing impression.

C. Students should also be introduced to the concept of keeping a personal telephone directory of numbers frequently called. If they complete the interpersonal observation in 1206.02.06, they can be instructed to ask about personal directories. When students return to class it will be possible to compare responses.

1206.02.02 Many of the simulations in 1206.02.01 require that accurate messages be taken for the attorney. As students are completing the preceding objective, have them begin to take messages midway through the training. Check the work personally to insure that the messages are clear and complete.

1206.02.03 As students are training, demonstrate how to screen calls properly for the attorney. Procedures differ by office, so several variations are desirable. This is a sensitive area and students may not always be asked to perform this function at entry-level. Nevertheless, practice will prepare them to use appropriate procedures later.

1206.02.04 This objective can also be taught/learned simultaneously with 1206.02.01 above after students have mastered effective telephone techniques. The instructor must first establish which procedures to use for scheduling. Then modify simulations to include scheduling situations. It is advisable to have students use more than one technique for this objective.

1206.02.05 The same strategy as 1206.02.05 applies here.

A. Discuss with students the basic rules of client relations. Each is presented below.

BASIC RULES OF CLIENT RELATIONS
1) Be Sincere: People always appreciate honesty and sincerity. When you say something, be sure you mean it.

2) Smile: Smiling is an important way of communicating. A smile generates a feeling of warmth and pleasantness--it is a mental "door-opener."
3) Call People by Their Names: People appreciate being recognized as individuals. Take time to notice their names and use them.
4) Be Understanding and Sympathetic: Never make anyone feel foolish or "dumb" if s/he makes an error or does not understand a procedure. Remember that you make mistakes, too. Take time to answer questions or explain things carefully.
5) Listen Attentively: Everyone likes to be treated with consideration and respect. Listen carefully to all requests, complaints, and questions. In order to respond properly, you must listen to what is being said.
6) Avoid Arguments: Be agreeable as far as you can. Don't get upset just because someone else is upset; it won't solve anything. Start by determining what the problem is. Then agree that there is a problem, and repeat it as you understand it. Once the problem is defined, do your best to solve it, or refer the person to someone who can solve it.
7) Be Courteous: Courtesy need not be a great effort; it's the little things that count. A polite "excuse me," "thank you," or "you're welcome" indicates to the client that you are considerate of his needs and feelings. People also appreciate being told to expect a short delay and having procedures explained to them. Try to treat others in the same pleasant way you like to be treated.
8) Be Appreciative: Everyone likes to know when they've done something right--say "thank you," and mean it.

B. For students to effectively assist clients, they will need to understand the people they are serving. There are many different types of clients with whom the student will interact. They will find that the majority of people are pleasant and friendly, and that the few who create problems can be handled if treated with thoughtfulness and consideration.

Six general "types" of people are outlined below. Included in each description are suggestions on how each type of client might be handled best. Students should understand that these suggestions will be helpful in client contact, but that it its important to remember that each person is an individual and should be treated as such.

1. The High-Gear Person
This is the person who is always in a hurry. S/He wants quick service, and tends to be impatient. S/He doesn't understand why everyone else is so slow. How can you handle him/her?
- Try to recognize him/her (waiting in line or at the counter).
- Get what s/he wants quickly, and avoid asking unnecessary questions. Don't irritate him/her.
- Use all of your self-control, plus a good deal of tact and diplomacy.

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2. The Low-Gear Person

This is the exact opposite of the "high-gear" person--s/he is slow and deliberate in his/her movements. S/He is very patient, and does not explode; s/he is also a good listener who wants the details. How should you handle him/her?

- Do not get irritated at his/her slowness; slow down with him/her.
- Give him/her all the details of a situation or service--s/he won't settle for less.
- Show an interest in him/her and don't rush him/her.

3. The Know-It-All Person

This is the person who acts as if s/he knows all the answers. S/He wants to impress people, and often displays a superior attitude. S/He likes to contradict what others say. How should you handle him/her?

- Ask his/her opinion about something.
- Don't show resentment--and be patient with him/her.

4. The Undecided Person

The undecided person can never make up his/her mind. S/He is apprehensive and uncertain when it comes to making decisions. S/He needs the support of other people. How should you handle him/her?

- When s/he has to make a decision, offer a minimum number of suggestions or choices.
- Diplomatically guide his/her decision and help him/her narrow his/her options; make him/her feel that by his/her actions or something s/he said, you believe s/he wants to do "such and such" thing.

5. The Unsociable Person

This person is not hard to detect because s/he shows his/her lack of friendliness and cooperation through his/her face, his/her voice, and his/her actions. S/He is often skeptical and suspicious. How should you handle him/her?

- Restrain yourself from the natural antagonism which his/her behavior might arouse.
- Don't try to "warm him/her up" by being over-friendly. If you acknowledge his/her right to be unfriendly and refrain from trying to make him/her over, s/he may become your friend in the long run.

6. The Sociable Person

This person is friendly, agreeable, and talkative. S/He can be particularly exasperating because s/he wants to discuss everything but business. This person has to be put on the "right track"--diplomatically. How should you handle him/her?

- Be friendly and do a reasonable amount of genuine listening.
- Try to manage the conversation so you can bring it to a close without being abrupt.
- This type of person is usually unaware that he is delaying you or other people. Don't embarrass him by letting him know he is.

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C. After class discussion and/or class demonstration of A and B above, a practical exercise will serve to reinforce these concepts. In this exercise, students will be observing the communications and interpersonal skills of people who work in legal occupations. Instructions to students are:

1. Students will be divided into teams of 2 or 3 students.
2. The team will select the legal office and specific occupation they wish to observe and with the instructor's help, make any necessary pre-visit arrangements. (Unless the instructor prefers, it is not necessary to focus exclusively on legal offices. All business involves interpersonal relations).
3. Students should read the Observation Guide before the visit.
4. During or after the visit, students will complete the Guide.
5. When the teams have finished, the class will discuss the effective and ineffective behaviors each team observed.

OBSERVATION GUIDE: Interpersonal and Communication Skills

Type of Office ____________________
Employee's Occupation ____________________
Does the employee deal primarily with the client? ____________________
Other employees? ____________________
What tasks does the employee perform? ____________________
____

Does the employee:
    Greet the client? ____________________
    Speak directly to the client? ____________________
    Assist the client? ____________________
    Serve the client promptly? ____________________
    Answer questions? ____________________
    Attempt to satisfy client requests? ____________________
    Keep clients waiting? ____________________
    Speak to other employees: between clients? ____________________
        while clients are waiting? ____________________
    Talk on the telephone on personal matters? ____________________

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Walk away from his/her place to chat with other employees? ____________________
Speak softly but clearly and courteously? ____________________
Thank the client after the transaction is complete? ____________________
Disagree with the client? ____________________
What is the best action by the employee you observed? ____________________
____
What is the worst action you observed? ____________________
____

1206.02.07 The instructional strategies for 1206.02.01 apply here as well.

1206.03.01 Posttest Directions:

1. Referring to a table of long distance rates in a local telephone directory, what are the typical rates for the first three minutes from your town to the major cities indicated?

	Station-to-Station		Person-to-Person	
	Day	Night	Day	Night
a. Phoenix, Arizona				
b. New York, New York				
c. Anchorage, Alaska				
d. Great Falls, Montana				
e. Honolulu, Hawaii				
f. Chicago, Illinois				

2. Assume that it is the month of July and you are a Legal Secretary in an office located in the Central Time Zone. The area in which your office is located is on standard time, but during summer months many parts of the country are on daylight saving time (DST), which is one hour ahead of standard time. For each of the situations listed below, determine the hour to be used. Refer to the map on the following page for assistance.

   a. You are to place a call to Chicago when it is 10 a.m. in Chicago (DST). At what time will you place the call?

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- b. You have been asked to place a call to Los Angeles at 4 p.m. What time will it be in Los Angeles (DST) when the call is received?
- c. You have received a long distance call from New York City. The doctor who is being called is out of her office but will return the call at 1 p.m. Since New York is on DST, what time will you tell the party in New York to expect the return call?
- d. You have received a call from a city which is on Mountain Standard Time. The attorney who is being called is out but will return shortly. The party calling asks that s/he return the call at 3 p.m. Mountain Standard Time. At what local time should the attorney return the call?
- e. You have been asked to call a client in Denver at 2 p.m. What time will it be in Denver (DST) when the call is received?

3. For each situation listed below, tell what technique for using multi-button or key telephones you should use.
   - a. A call comes in to one of the lines connected to your telephone, and the button connected to that line flashes.
   - b. You wish to make a call from your multi-button telephone.
   - c. While you are talking to a party on one outside line, a button connected to a second outside line flashes.
   - d. You wish to terminate a second call and return to a party who was previously asked to hold.
   - e. You wish to signal your assistant to come to your office.
   - f. You wish to talk on the telephone to someone else in your office.

4. For each situation listed below, tell what technique your should follow for using the Call Director.
   - a. A flashing line button and a coordinated bell indicate an incoming call.
   - b. The caller wishes to speak to your supervisor.
   - c. You wish to make an outside call.
   - d. The bell rings and the DL INT button flashes.
   - e. You wish to call an interoffice extension.

Answers: Answers will vary according to most current rates. Other responses should be analyzed separately.

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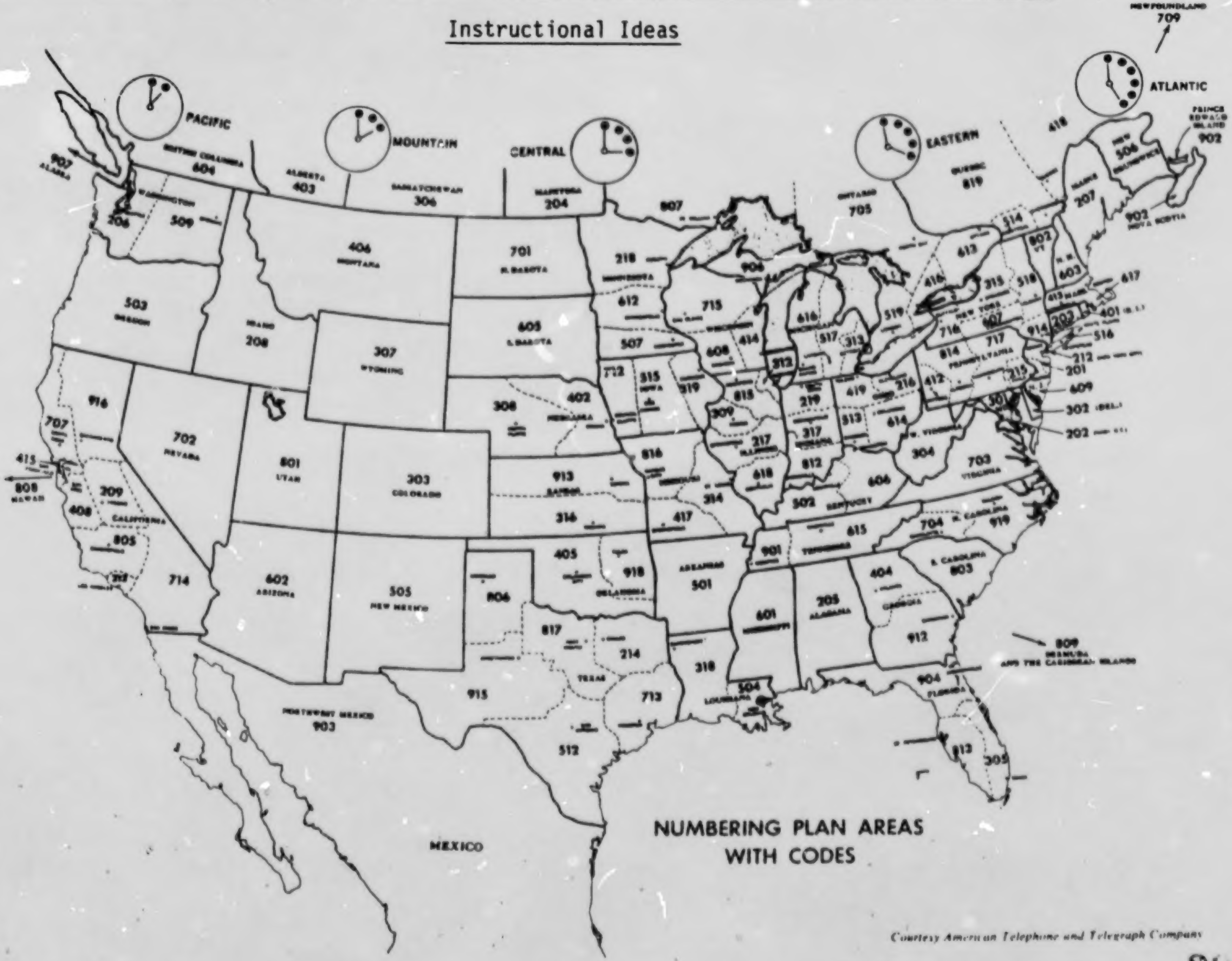

NUMBERING PLAN AREAS
WITH CODES

Courtesy American Telephone and Telegraph Company

Number	Instructional Ideas
1206.03.02	Pretest Directions: Circle the letter in front of the alternative that best completes each of the following statements.

1. Your office will appear more attractive to clients if you:
   a. use common sense in difficult situations.
   b. concentrate on transactions and ignore "people" skills.
   c. spend a few minutes chatting with each client.
   d. overlook clients' privacy from time to time.
2. If a client tells you that s/he tried to reach your office by phone all morning with no success, you should say:
   a. "It's funny you should mention that. I've heard nothing but complaints about that."
   b. "I know what you mean. I've had the same problem."
   c. "I'm sorry. Since you're in the office, may I help you."
   d. "It figures. Why do we bother paying the phone bill every month."
3. If a stranger approaches you and hands you a bill with the name Ricardo Hernandez and a $50 check, you should say:
   a. "Are you Ricardo Hernandez?"
   b. "How are you today, Mr. Hernandez?"
   c. "Is this the only business you wish to transact today?"
   d. "I don't remember taking care of you before. Are you new here?"
4. Which remark indicates a legal office with good client relations? Someone says:
   a. "The woman at the front desk, on the phone, and with four clients waiting, looked up, caught my eye, and gave me this big smile. ... . ."
   b. "I had to wait a long time, but I could still hear the receptionist saying crossly, 'Why do you all come in at once?' "
   c. "I wandered around like a lost soul and absolutely no one knew I was there."
5. If you don't know a client's name, it's best to say something like:
   a. "Have you been in here before?"
   b. "Hello. How are you today?"
   c. "Let's see . . . should I know you?"
6. If you really can't hear a client's request, you'd say:
   a. "Can't you talk a little louder?"
   b. "It's so noisy in here . . . what did you say?"
   c. "I'm so sorry, Mrs. Kirk. I didn't hear what you said."

Number Instructional Ideas

7. When just one employee is irritable and impatient with a client, it affects that client's attitude *toward the entire office because:*
   a. people are really unfair about things like this.
   b. the office is where it happened.
   c. Feelings are so complex. Who knows?
8. When you deal with clients directly or indirectly, which of the following are important?:
   a. your attitude.
   b. what you say.
   c. the tone in which you say it.
   d. all of the above.
9.. When a client approaches your desk, you should:
   a. complete the transaction quickly without looking up.
   b. greet the client with a smile and ask how you can help.
   c. assume that the client is irate and call your supervisor.
   d. continue filing, or doing whatever task is at hand.
10. Carefully listening to clients' requests helps you:
   a. save time.
   b. avoid mistakes.
   c. recognize potential problems.
   d. all of the above.

Answers: 1. a; 2. c; 3. b; 4. a; 5. b; 6. c; 7. b; 8. d; 9. b; 10. d

1206.04.01 Posttest Directions: Circle the letter in front of the phrase that best completes each of the following statements.

1. If a client walks up to your window and starts to yell at your before you've had a chance to say a word, chances are:
   a. you glared at the client without realizing what you'd done.
   b. the client doesn't like you.
   c. you were rude when the client was at your window last week.
   d. the client has had a bad day.
2. The first step in calming an angry client is to:
   a. listen to the complaint without getting involved.
   b. say that the problem can't be as serious as it sounds.
   c. say you don't know how to handle the request.
   d. become as angry as the customer.

Number **Instructional Ideas**

3. If a talkative client won't leave your desk you should:
   a. leave your desk temporarily.
   b. let him/her keep talking.
   c. say that you have better things to do than listen to him/her all day.
   d. say that you'd like to talk but there are clients waiting.
4. If there are other clients waiting, but the client at your desk doesn't understand the messages which you've repeated several times, you should:
   a. tell the client to hurry up.
   b. repeat your messages one more time in a louder voice.
   c. introduce the client to an employee who can take the necessary time.
   d. tell the client to wait until you have more time.
5. If you notice that a client at the end of a line keeps stamping his foot, checking his watch, and muttering something to himself, you should:
   a. yell to him/her to come back later
   b. sacrifice a little accuracy for speed.
   c. refuse to become hurried.
   d. ask him/her why s/he's so impatient when s/he finally gets to the front of the line.
6. An elderly client snarls, "Young man, I've been coming here for 54 years and you ought to know my name." You should say something like:
   a. "I'm sorry I don't, 'mam. I'm new here. Let's introduce ourselves. I'm Earl Grant. Please tell me your name, and I'll know next time for sure."
   b. "Gosh . . . I don't think I ever saw you before. And I've got other people waiting so . . . what did you want?"
   c. "Well . . . give me a chance . . . I just started here . . . so it's not fair for you to take that attitude. A new job makes me nervous anyway. Have a little consideration . . . others are waiting, you know."
7. A lot of people are waiting and the client you are helping is talking on and on. A good thing to say would be:
   a. "Nice to see you back, Mr. Black, but others are waiting."
   b. "Goodbye."
   c. "You really had a bad time. I'm sorry. How long were you in the hospital?"
8. A waiting client is both impatient and hostile. You hear him say loudly: "Every time I come in here, it's wait, wait, wait!" When he gets to you, you might want to say:
   a. "Hi. We both know you always come fifteen minutes late, right?"
   b. "Mr. Beyer, you're not the only one who waits, you know."
   c. "Sorry we're so busy. I'll do this for you as quickly as I can."

Number Instructional Ideas

9. You have a shy client who is having difficulty explaining the purpose of his visit. You would say:
   a. "What's your problem anyway?"
   b. "Let me help you. Perhaps a few questions will help."
   c. "Here's a friendly tip: spit it out or forget it."
10. After you call a client back and identify yourself, the next thing you should do is:
   a. establish what the call was about in the first place.
   b. deliver the wanted information promptly.
   c. make an excuse if you don't have the information yet.
11. Whether simply answering someone else's phone or taking the message, you will:
   a. explain why the person is not at his/her desk.
   b. give and get all pertinent information.
   c. tell the caller you're not able to help.
12. It's harder to establish a feeling of warm, personalized service on the phone because:
   a. the caller isn't "real" to you.
   b. your real surroundings distract you.
   c. it must be done with words and voice alone.
13. A client phones and says she thinks there's an error in her bill. You'd say:
   a. "Well, don't tell me about it."
   b. "I'm sorry. I'll connect you with Mrs. bell, our bookkeeper."
   c. "Believe me, lady, the office doesn't make many mistakes . . . we have to balance, you know. But I'll switch you to someone who can look it up."

Answers: 1. d; 2. a; e. d; 4. c; 5. c; 6. a; 7. a; 8. c; 9. b; 10. a; 11. b; 12. c; 13. b

1206.05.01 Thirty legal telephone conversations were developed by Dr. Alice L. Holst (ret.) of Vintage High School, Napa Unified School District, are now on file in BEDDS. Use the order blank on page 30 to request "Simulated Legal Telephone Conversations," I.D. # 003-302.41.

Number	Condition	Performance	Standard
1207.01.01	Given client contact, legal forms and documents, and other work related to a legal practice,	the student will maintain the confidentiality of all work	without exception.
1207.01.02	Given situations which involve legal ethics,	the student will respond appropriately	to the satisfaction of the instructor and/or the work experience supervisor.

Number	Instructional Ideas

GENERAL COMMENT:

The institution of business is rooted in ethics, even though we may seem to have lost sight of these foundations. A dictionary definition of this term is: "Dealing with what is good and bad with moral duty and obligations." Business ethics, therefore, pertains to the good and the bad, the moral duty and obligations of business and business persons. At the heart of ethics in business is respectability for business and businessmen. Basically, business is an ethical endeavor. Most individual businessmen are honest. However difficult the job of teaching ethics in business classes is, teachers in cooperation with businesses should be getting on with teaching the positive relationships among private ethics, business ethics, and the social ethics of a good society.

1207.02.01 An important consideration, and one which the Legal Secretary must continuously face, involves the area of confidentiality of client calls, legal correspondence, etc. This is an area to which the instructor should refer frequently for effective reinforcement. Students who are engaged in work experience will have first-hand experience with this matter. If the class is performing work for people in the community, confidentiality will probably also arise. If neither situations exists, invite a Legal Secretary or attorney to discuss this issue with the class.

1207.02.07 A. When matters of legal ethics arise, students with little experience will tend to respond in ways which are familiar. If students know their own traits or have made an effort to look closely at individual traits, their responses may be more predictable. The information and exercise which follows may be helpful.

Those characteristics of students that are important to a Legal Secretarial career and which will affect responses to situations involving ethics include:

- Honesty and integrity
- Interest and enthusiasm
- Dependability
- Industriousness
- Creativity
- Cooperation
- Courtesy
- Efficiency
- Patience
- Sincerity
- Loyalty
- Perseverance
- Willingness to assume responsibility

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All the traits can be developed. For this reason, give students an opportunity to rate themselves now on these traits and then again after they have had opportunities to develop any areas of weakness. A further advantage of this kind of exercise is that most employers rate their employees. This exercise begins to accustom students to employee performance evaluations.

Number

Instructional Ideas

Directions: Have students rate themselves on the personality traits listed in the following table. Then the instructor completes a rating on each student.

Students will compare the ratings and should save the results for comparison with a new set of ratings at the end of the course.

Personality Traits	Your Rating			Instructor's Rating		
	Excellent	Fair	Poor	Excellent	Fair	Poor
1. Honesty and integrity						
2. Interest and enthusiasm						
3. Dependability						
4. Industriousness						
5. Creativity						
6. Cooperation						
7. Courtesy						
8. Efficiency						
9. Patience						
10. Sincerity						
11. Loyalty						
12. Perseverance						
13. Willingness to assume responsibility						

Number

Instructional Ideas

Students can now consider ways to improve on all or some of these traits. In some cases, self-improvement will be a matter of changing attitude. In other cases, it is a matter of changing habits. The following "What to Do" hints may be helpful. The hints are stated in terms of employment tasks. If students are not employed, they can think in terms of school situations.

What to Do to Improve Personality Traits

1. Honesty and integrity
   Take care of the office's supplies and materials.
   Keep all promises.
   Give accurate information to clients.
   State an opinion honestly when asked.
   Be truthful with co-workers, employees, and managers.

2. Interest and enthusiasm
   Learn about the office's service.
   Become interested in client's problems.
   Put sparkle in your voice.
   Take part in the office's activities.
   Read the office's and competitors' ads.
   Show pride in the office.
   Learn about the importance of your job to the total operation of the office.

3. Dependability
   Be ready to serve clients.
   Follow the office's procedures and policies.
   Complete all assigned duties.
   Make accurate and complete reports.
   Take only the allotted time for refreshment breaks.
   Call the appropriate supervisor immediately if absence is necessary.

4. Industriousness
   Keep busy.
   Offer to assist others.
   Be steady in your work.
   Be persistent about finding answers to problems.
   Work hard to ensure that reports are accurate and complete.

5. Creativity
   Notice things that need to be done, and do them without being told.
   Look for better ways to do the job.
   Develop your own ideas.
   Make helpful suggestions.
   Demonstrate initiative in dealing with clients, other employees, and managers.

6. Cooperation
   Work as a member of a team.
   Know and follow the office's policies.
   Observe rules and regulations.
   Help new employees.
   Help fellow employees.
   Demonstrate sensitivity to the needs and motives of co-workers, supervisors, managers, and clients.
   Work cooperatively with individuals outside the office, such as suppliers, advertisers, and community representatives.

Number

Instructional Ideas

7. Courtesy
   Treat clients as guests.
   Be polite to everyone.
   Show appreciation.
   Show consideration for others.

8. Efficiency
   Plan your work.
   Do first things first.
   Keep supplies and materials in order.

9. Patience
   Give clients time to think or (allow clients to take their time).
   Give clients a chance to explain their problem completely before trying to help them to solve it.
   Be calm when dealing with clients' personal problems, such as divorce or financial setback.
   Display self-control in trying situations (or keep your temper).
   Adjust to the demands of the job, such as deadlines, pressures, and conflicts.

10. Sincerity
    Mean what you say.
    Be genuinely concerned about others.
    Be yourself.
    Demonstrate sincerity through your actions.

11. Loyalty
    Be a client of your office.
    Avoid complaining about your office to outsiders.
    Explain the office's policies to clients.
    Keep the office's business confidential.

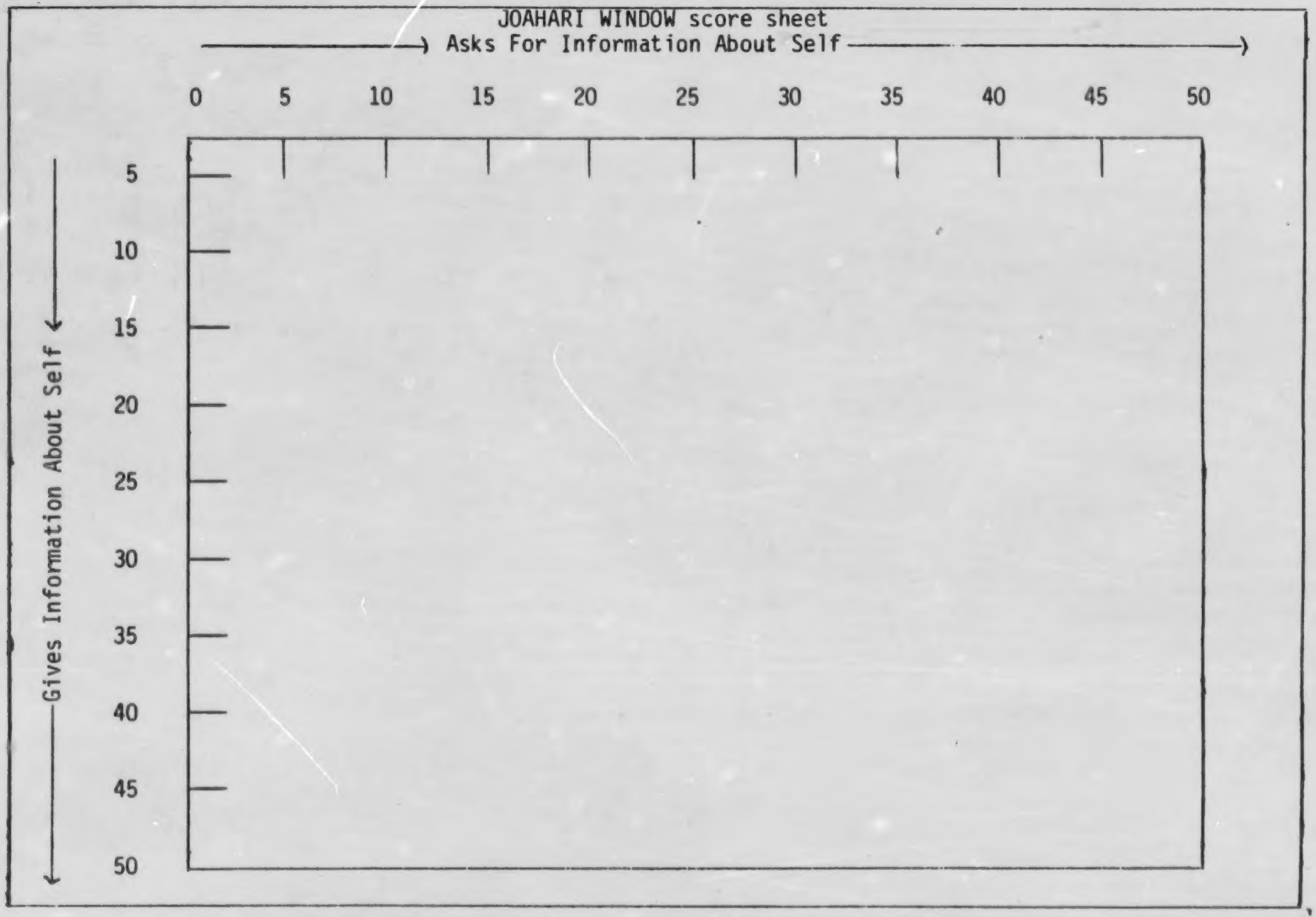
12. Perseverance
    Stick to a task until it is completed.
    Work steadily toward each goal you set.
    Never give up on what you set out to do.

13. Willingness to assume responsibility
    Think of yourself.
    Make decisions in a systematic manner.
    Accept credit or blame for decisions.
    Accept responsibility for the work of the employees you supervise.
    Assume a shared responsibility for the success or failure of your work group.

B. Awareness of ethical situations is also important for preparing students for careers in legal offices. "Legal Secretarial Ethics" were developed by Dr. Alice L. Holst, who made a habit of introducing two ethics lessons every week as students entered class. Students were instructed to write the lessons in their notebooks which were collected at the end of the term, and the written lessons contributed to students' grades. Instructors may request the instructional modules from BEDDS (order form on page 31) by asking for I.D. # 003-302.42.

Number	Instructional Ideas
1207.03.01	Have each student complete a Johari Window Test. (David W. Johnson, Reaching Out: Interpersonel effectiveness and self-Actualization, Prentice-Hall, Inc.; Englewood, Cliffs, New Jersey, 1972). Have each student plot his/her score on a Johari Window score sheet like the one on the following page. Have students answer the following questions. There are no right answers. The point of this posttest is to have students consider their typical reactions, which one would also expect in the working environment. 1. How can a person with a large blind spot decrease the blind spot and make the area bigger? 2. How can a person with a large hidden section decrease the hidden section and make the area bigger? 3. How can a person with a large unknown section decrease the unknown section and increase the area?
1207.04.01	There is no hard and fast way to test for this module. The proof of the pudding will be whether students enjoy an ethical employment. However, if the instructor has students write the lessons in a notebook each time one is presented, a competency score might be based on completeness of information.
1207.05.01	The Los Angeles County Office of Education was under contract to the Vocational Education Unit to develop instructional media in this area. As of this writing, materials are in the developmental stage. Results should be available in 1981. Please consult the Vocational Education Unit in Sacramento or the Regional Offices for further details.
1207.05.02	See 12707.02.07 B for suggested BEDDS material.

Number **Instructional Ideas**



JOAHARI WINDOW score sheet

Number	Condition	Performance	Standard
1208.01.01	Given appointments which have been scheduled for clients,	the student will cross-reference with the central office calendar (if there is one) and the attorney's personal calendar	with 100% accuracy.
1208.01.02	Given meetings, conferences, and business trips to be scheduled,	the student will make the necessary arrangements	for the smooth execution of all such activities.
1208.01.03	Given a day's appointments,	the student will prepare all necessary files and related matter	to the instructor's and/or supervisor's satisfaction.

Number Instructional Ideas

1208.02.01 Scheduling appointments with clients has already been covered in 1206.02.04 and 1206.02.05. An additional skill needed to complete the process includes checking appointments on the office calendar, the attorney's personal calendar, and the central office calendar to avoid any conflicts. Applicable strategies would certainly include discussion and demonstration. Something which students can do themselves is to develop a class calendar and to check this calendar against the master school or college calendar. Further, as conflicts arise between a student's own personal calendar and that of the class, the instructor might use this as an opportunity to reinforce the concept of careful calendaring and how important the concept is to the business office where appointments are the lifeblood of the business.

1208.02.02 The more practical experience students have with arranging meetings and conferences, the more proficient they will become. Many opportunities should present themselves as instructional strategies. Students can arrange Advisory Committee meetings, for example. If a school-related conference is to be held on campus, students can also be involved. There are magazines and films available on how to stage effective meetings and conferences, and these would be excellent resources. Have students call local hotels or the Chamber of Commerce to ask for specific information on meeting facilities. Encourage students to join groups and become organizers within those groups. If members of the Business Department are scheduled for professional trips, suggest that students could handle the arrangements. Invite someone from a local travel agency to discuss travel arrangements with the class.

1208.02.03 Preparing for a day's appointments means recognizing what is needed for the day's business at hand, mentally or literally arranging a schedule for accomplishing things, and possibly following directions which have been previously given. The first two are organizational skills which will automatically follow if the classroom is at all set up like a production center or if the classroom is organized around predictable lecture/lab hours. In these instances, the students are self-directed and have to be able to manage their own time to accomplish the work expected of them. There are various exercises which instructors can use to help students increase their ability to follow directions. Not all students will need such practice, but for those who do, exercises like the sample which follows should be of help.

EXERCISE IN FOLLOWING WRITTEN DIRECTIONS:

Using a map like the one below, ask students to follow the instructions also written below. Instructions to students: Place each X exactly over the intersections of the streets and proceed with each successive instruction by starting from the last X you wrote, except in the instances where you are instructed otherwise. Number each X as you write it. When you write an X let it stand, make no erasures. There is no time limit, but you are competing with the other members. When you have completed the ten instructions, fold your sheet and keep it folded.

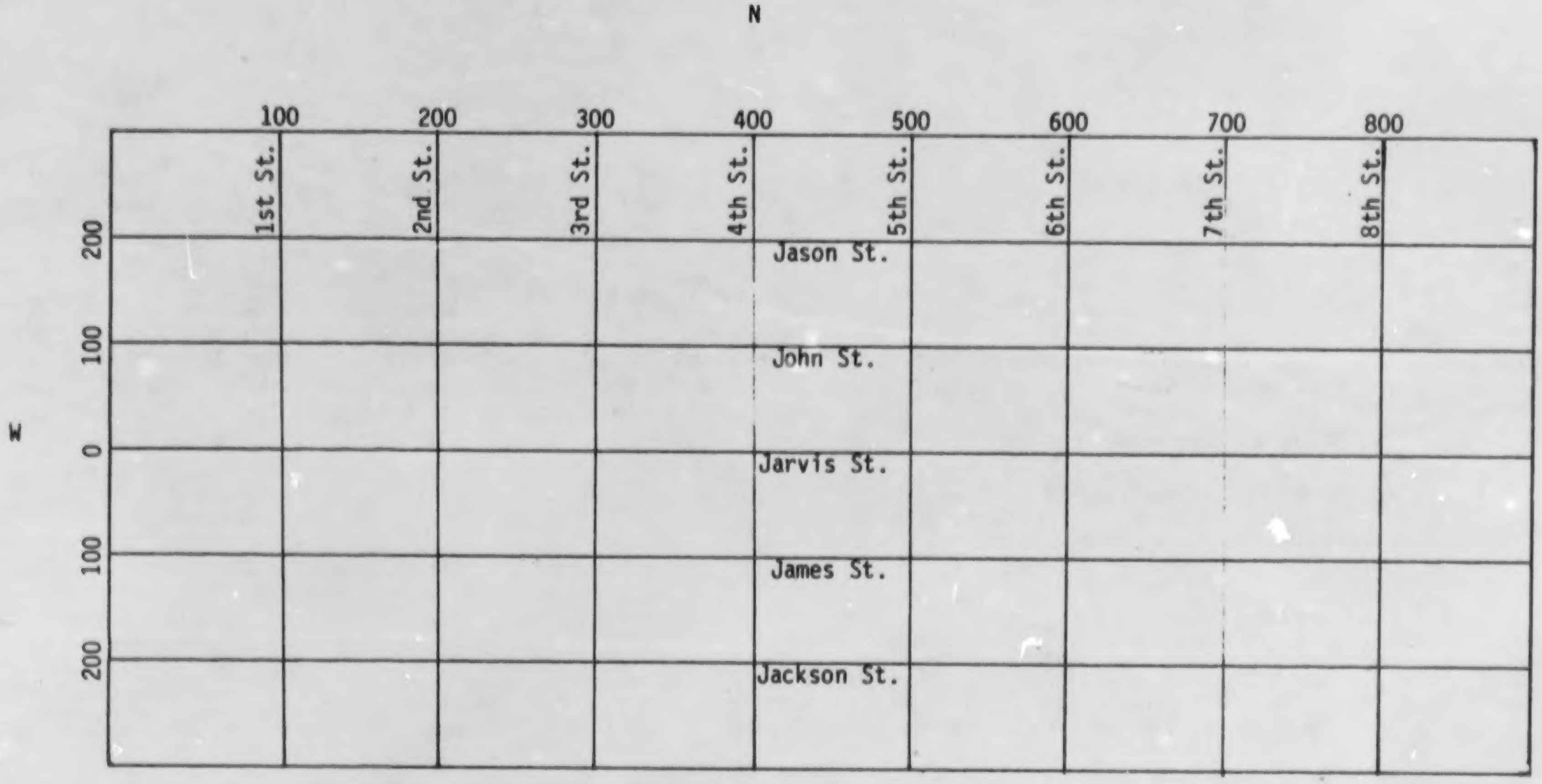
Number | Instructional Ideas

1. Place an X at the corner of Johns and 5th Streets.
2. Walk two blocks east, three blocks south, two blocks west, one block north and place an X at the corner where you arrive.
3. Walk one block east, three blocks north, one block east and place an X at the corner where you arrive.
4. Walk five blocks south, two blocks west, three blocks north, one block east and place an X at the corner where you arrive.
5. Walk three blocks west, one block south, five blocks east, and place an X at the corner where you arrive.
6. Walk one block east, three blocks west, three blocks north, and place an X at the corner where you arrive.
7. Place another X as far from the west and south borders of the map as your last X is from the west and north borders of the map.
8. Start north, zig-zag north and east, alternating one block at a time and walking five blocks in all, then place an X at the corner where you arrive.
9. Start at the opposite corner of the block southeast of were you placed the last X, walk two blocks west and place an X at the corner where you arrive.
10. Go three-fourths of the way around a square that has the length of two blocks on each side, starting where you placed the last X and ending south of your starting point. Place an X at the corner where you arrive.

Number

Instructional Ideas

MAP FOR WRITTEN COMMUNICATION EXPERIMENT



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Number	Instructional Ideas
1208.03.01	Pretest Directions to the Instructor: This module involves good organizational and listening skills. Watch each student closely to determine how effective a listener each is. If a student seems to have difficulty listening, encourage him/her to: 1) Concentrate on the speaker 2) Eliminate emotional reactions 3) Lessen interruptions and avoid daydreaming 4) Listen for key thoughts 5) Summarize mentally or take well-organized notes 6) Review mentally Analyze each student's performance individually and discuss his/her strengths and weaknesses in these two areas. Suggest specific strategies for improvement.
1208.04.01	Use the same methodology as 1208.03.01 above for the posttest. This is a highly individual matter and needs to be assessed accordingly.
1208.05.01	Use personnel from local offices to talk with students about organizational skills. Personnel from travel agencies can be most helpful.

Number	Condition	Performance	Standard
1209.01.01	Given work by the attorney on behalf of clients,	the student will collect and summarize time sheets	with 100% accuracy according to established procedures.
1209.01.02	Given time spent on behalf of each client,	the student will post the time to each client's records	with 100% accuracy according to established procedures.
1209.01.03	Given client records which show monthly legal work,	the student will prepare a client statement	with 100% accuracy according to established procedures.
1209.01.04	Given clients which make payment against their statements,	the student will maintain payment records	with 100% accuracy according to established procedures.
1209.01.05	Given monthly or more frequent payments,	the student will prepare and make bank deposits	with 100% accuracy according to established procedures.
1209.01.06	Given payments, non-payments, and deposits,	the student will maintain the general ledger	with 100% accuracy.
1209.01.07	Given statements which are overdue or bad checks,	the student will initiate action	according to established office procedure.

Number Instructional Ideas

GENERAL COMMENT:

New Legal Secretaries in small offices are more likely to need to know about recordkeeping and banking than Legal Secretaries in large offices where a bookkeeper might be hired. Nevertheless, teaching/learning this module is advisable for two reasons: 1) students usually cannot be sure where they find a job and 2) students will appreciate the business aspects of the legal office much more if they have this background. The importance of conservation and efficiency will take on new meaning.

1209.02.01 If any outside work is being done by the class, this objective and the next three will follow automatically. The instructor simply needs to distribute time sheets to every student to keep track of his/her efforts on behalf of outside clients. Then at some point, usually monthly, students will summarize the time sheets as the first step in the recordkeeping process. Likewise, it is also possible that students in work experience positions might be exposed to summarizing time sheets at their work stations. If students do not have access to either of these experiences, then the instructor might consider letting the teaching situation simulate the legal office. I.e., the instructor is the "attorney" and the students are the clients. Whenever the instructor spends individual time with any student, it would be recorded on the instructor's time sheet and summarized at the end of the month.

1209.02.02 The next step is to distribute the time spent on behalf of clients to the client accounts. Depending on which simulation is used, these accounts would either be outside client accounts or student client accounts. (See 1209.02.01 above). This objective is taught in conjunction with summarizing time sheets.

1209.02.03 The next step, preparing client statements, would actually be done if the class were accepting outside work. It might be done if the "instructor-attorney" simulation were being used. If it is not done in the latter case, then there should at least be some discussion and demonstration.

1209.02.04 Likewise, actual payment records would be kept by students for outside clients. Otherwise, discussion and demonstration of how the process works would be sufficient. The instructor should check frequently to make sure that students understand both the sequence and relationship of the various steps in keeping records.

1209.02.05 Discussion and demonstration should be a prelude to some kind of actual experience. If outside clients are paying for jobs done, then students can be assigned banking practice. The instructor should encourage each student to open a bank account (if s/he does not have one already), even if the initial deposit is very small. Show the similarities between personal banking and business banking.

Number	Instructional Ideas
1209.02.06	These various steps all converge when the Legal Secretary has to maintain the general ledger. To teach/learn this objective, invite a Legal Secretary to speak to the class on this objective. If possible, encourage the guest to bring examples so that students can see how all the tasks fit together.
1209.02.07	Many times students will not be asked to perform this function. Perhaps the student is young. Often people (i.e., clients) resent having a young person do this type of work. Other times the attorney will take responsibility for collections. Nevertheless, students can know what is involved, and perhaps they will be asked to initiate action. Again, the Legal Secretary who discusses the general ledger above might be a good candidate for presenting collection experience here. Show students what type of bill or warning is sent to clients who do not meet their commitments and how collection agencies would function in the collection process.
1209.03.01	Pretest Directions to the Instructor: Obtain blank deposit slips from a local bank. Instruct students to simulate a banking situation by completing a deposit for the legal office. Provide at least four separate items for deposit.
1209.04.01	Refer to the CBEP Guide, Bookkeeping Supplement, for applicable posttests.
1209.05.01	Tax and Information Returns are available from the local post office, accountants, or the IRS office if close by. Materials which will be useful for the Legal Secretary who keeps the attorney's financial records include: 1. Form W-4, Employee's Withholding Exemption Certificate 2. Form 501, Federal Tax Deposit 3. Form 941, Employer's Quarterly Federal Tax Return 4. State Quarterly Contribution Return and Report of Wages Paid 5. Form 940, Annual Federal Tax Return of Employers 6. Form W-2, Wage and Tax Statement 7. Form W-3, Reconciliation of Income Tax Withheld form Wages.

Number	Condition	Performance	Standard
1210.01.01	Given material to be mailed,	the student will stuff and stamp envelopes	neatly and attractively to the satisfaction of the instructor and/or work experience supervisor.
1210.01.02	Given material to be mailed,	the student will sort mail	to the satisfaction of the instruction and/or work experience supervisor.
1210.01.03	Given material to be mailed,	the student will meter mail	with 100% accuracy.
1210.01.04	Given material to be mailed,	the student will certify mail	with 100% accuracy.
1210.01.05	Given material to be mailed,	the student will utilize the correct form of service	with 90% accuracy on a criterion-reference test.
1210.01.06	Given messages to be sent more quickly than mail or personal delivery,	the student will be able to use telegrams and cables	to the satisfaction of the instructor and/or work experience supervisor.
1210.01.07	Given out-going mail,	the student will obtain proper signatures	with 100% accuracy and to the satisfaction of the instructor and/or work experience supervisor.
1210.01.08	Given in-coming mail,	the student will open and log mail	according to established procedures.
1210.01.09	Given in-coming mail,	the student will prioritize mail for the attorney and/or office	to the satisfaction of the instructor and/or work experience supervisor.

Number Instructional Ideas

GENERAL COMMENT:

The legal office is in the business of processing information. Just as the telephone was an important element in the legal office, so too is the mail. It is important for the Legal Secretary to begin the new job with as much know-how in this area as possible.

1210.02.01 A professional impression is created when a precisely folded, neatly stuffed, and properly stamped envelope arrives on a client's desk. The receiver may not express much appreciation for mail properly mailed, but is likely to notice when it is improperly mailed. Instructors will want to teach folding, efficient insertion, properly placed stamps. If the central school or college office has a large mailing job, the instructor might volunteer the class to do it.

1210.02.02 A. Sorting mail is a matter of inter-office efficiency. In-coming mail can be divided into three sorts: one pile for immediate attention and the others in descending order of importance. In a legal office where this is not current habit, the student should ask first before initiating such a system. Where sorting mail is the norm, the student must be prepared to learn what constitutes priority mail. A few practice exercises in the 3-sort technique, changing the definition of priority each time, should suffice to teach this objective.

B. The other type of sorting involves out-going mail where items are sorted by destination or letter vs. bulk, etc. If the instructor follows the strategy in 1210.02.01, teaching this objective can be accomplished at the same time.

1210.02.03 Mail meters cost varying amounts. There is even a free meter in the local post office, although the weight these will accommodate is usually limited. Very simple mechanical meters are available at little cost for the classroom. Companies such as Pitney-Bowes are generally glad to send salespeople for classroom presentation as students will one day help make decisions about office purchases. Again, if the strategy in 1210.02.01 is followed, there should be possibilities for teaching/learning metering. The instructor should check beforehand to determine exactly what kind of mail is involved for the central office.

1210.02.04 The first step in teaching/learning this objective involves explaining the rationale for certifying mail and the type of mail that would be certified. The second step is to demonstrate what certified mail costs. For this the instructor can assign extra credit to a student to research current costs, since they have been changing so rapidly in the last few years. The third step is to have students role-play the process of having mail certified so that they know what to expect when they are asked to perform this task in the office.

Number	Instructional Ideas
1210.02.05	The U.S. Post Office has several types of service for customers, including 24-hour mail delivery. In addition, there is United Parcel Service (UPS), Air Express, Messenger Services by car, courier services in financial districts, and the like. One instructional activity would involve assigning each student or small group of students to research one variety of delivery service and report to class. Instruct students to report on rates, availability of service, any and all constraints on the service, and the precise process for utilizing such service. Reports can be oral or written. If there have been a number of written reports during the instructional period, the instructor might wish to require an oral report to evaluate students' verbal skills and their mode of presentation.
1210.02.06	The preceding activities (1210.02.05) are equally applicable here.
1210.02.07	It is the Legal Secretary's responsibility to ensure that all correspondence and legal documents are properly signed by the attorney. The logistics of obtaining signatures is sometimes complicated by the fact that attorneys are in and out of the office and not always available. In this case the Legal Secretary has to plan ahead and know both documents will be ready for signing and the appropriate signer will be accessible. There is also a proper method of presenting material to the attorney for his/her signature. Usually this involves inserting the papers in a manila folder and placing this on the attorney's desk. Other times it is quite acceptable for the Legal Secretary to sign the documents for the attorney or stamp his/her name and initial to the bottom right of either. There are two things the new Legal Secretary must know: What is the organizational process for obtaining signatures and when can the Legal Secretary sign for the attorney. One way of teaching/learning this is to have students type class letters to vendors, Advisory Committee members, and the like for the instructor's signature. The instructor will identify the organizational pattern to follow, utilizing more than one approach during the year, including at least one time when the student signs for the instructor.
1210.02.08	Opening and logging mail is a seemingly simple matter. Yet attention should be given to having students do this neatly and correctly. It may be one of the first jobs they are assigned when they enter a legal office (especially work-experience students) and the first job on which they will be judged. Have students concentrate on opening letters, etc., with clean edges, dating the mail in the same place clearly each time, and writing down (if appropriate) the most important items which arrive.
1210.02.09	This objective is not actually repetitious of 1210.02.02 above, which involved judging what required priority because it had to be mailed immediately or was somehow more urgent than the rest. At times this will be naturally circumscribed: the attorney will make it very clear which items are urgent, or there is a known deadline to meet. Other times, however, the Legal Secretary's judgment will prevail. In this case, it is important that some sort of policy exist in the office so that the Legal Secretary has some

Number	Instructional Ideas
	kind of guideline for reference. One suggested strategy for teaching/learning time management is to discuss the subject as a class from time to time and point out practical examples from the students' own experiences which illustrate the concept.
1210.03.01	In office practice texts, such as General Office Practice, third edition, by Archer, Brecker, Frakes, and Stewart, there are several chapters denoted to mail services and skills. The instructor is advised that any of the criterion-reference tests in these units would be an acceptable pretest.
1210.04.01	See 1208.04.01 for applicable posttest.
1210.05.01	See 1210.04.01 above. These resources contain very useful descriptive material, as well as unit tests.

Number	Condition	Performance	Standard
1211.01.01	Given a variety of office equipment,	the student will apply preventive care	to the satisfaction of the instructor and/or work experience supervisor.
1211.01.02	Given legal forms, documents, etc. to be duplicated or other routine office jobs,	the student will utilize the copier, the ten-key adder, etc.	to the satisfaction of the instructor and/or work experience supervisor.
1211.02.03	Given paper material to be stapled and punched,	the student will perform the required task neatly and accurately	to the satisfaction or the instructor and/or work experience supervisor.
1211.01.04	Given an office with a variety of supplies,	the student will exercise inventory control	so that the office is always sufficiently stocked with needed supplies.
1211.01.05	Given a legal office or simulated situation,	the student will affect a general housekeeping routine	to the satisfaction of the instructor and/or work experience supervisor.
1211.01.06	Given a legal office or a simulated situation,	the student will maintain office security	according to established procedures.

Number **Instructional Ideas**

GENERAL COMMENTS:

The principal reason for including this module in the guide is that employers appreciate the employee who helps maintain the business's capital investments and saves service charges by (a) applying consistent preventive care measures and (b) knowing how to solve minor problems or at least analyze the problem for the technician and minimize service costs.

1211.02.01 A. As students begin using classroom equipment, it is important to instruct them in common problems at the onset and reinforce this knowledge as actual problems occur. One instructional strategy is to extract portions of a User's Manual and reproduce for class discussion, or have students abstract preventive care for certain equipment and share the results with the entire class.

B. Students are often hesitant to tell the instructor when equipment breaks down or otherwise goes awry. Task Force members encourage instructors to introduce students to a job equipment repair request like the example which follows and how to fill it out in logical and precise language. Then, if equipment does need attention and the form is not properly submitted, the instructor should not initiate a service call but wait until the class notices the broken machine and begins to complain about its disrepair. It may mean some temporary inconvenience if all students do not have access to equipment or a particular type of equipment, but the point is usually not forgotten.

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DATE ____________________

REPORTED BY ____________________

TYPE OF EQUIPMENT ____________________

PROBLEM ____________________

____

Number | Instructional Ideas

1211.02.02 A. There are many peripheral skills involved in Legal Secretarial work which are not in themselves very dramatic but, when taken together, add up to a smooth functioning, quality office. One strategy for teaching/learning such skills is to make them required lab jobs which students complete at a certain time of the week (or whatever is appropriate for the class schedule). This list has 18 jobs. The instructor might consider teaching one person in the class the correct procedure on one job and then letting that individual instruct/supervise the rest. As members of the class perform each job to the supervisor's satisfaction, the supervisor signs off on the task.

REQUIRED LAB JOBS

______ 1. Registration
______ 2. Ribbon changes (2)
______ 3. Ten-key adder
______ 4. Full-bank adder
______ 5. Printing calculator
______ 6. Electronic listing calculator
______ 7. Electronic display calculator
______ 8. Electronic listing-display calculator
______ 9. Electronic pocket calculator
______ 10. Copier
______ 11. File label preparation
______ 12. Mimeoscope
______ 13. Paper cutter
______ 14. Proportional-spacing typewriter
______ 15. PBX switchboard

B. The following method for collating is based on time and motion studies.

COLLATING

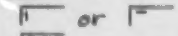
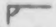
1. Importance of a systemmatic procedure.
2. Arrange papers in a semi-circle.
3. Page 1 to right.

Number — Instructional Ideas

4. Fan out (not large stack).
5. Touch top paper with hand moving toward you.
6. Right hand, fingers on top, thumb picks up. Slide toward you.
7. Left hand same.
8. Inspect for imperfect sheets.
9. Slide or drag sheet to next stack as left hand lifts next page.
10. One jog.
11. Crisscross, with tops of pages out and bottoms together.

1211.02.03 Stapling is another of those small peripheral jobs which also makes a difference when done correctly. The following points may be useful.

STAPLING

1. Important because often a first task. Will judge quality and speed.
2. Be sure silver square is forward on stapler. Pushed back, it makes temporary stapling; in center it crushes staples; pushed forward, it makes permanent stapling.
3. Most people are careless about stapling.
4. Or, if careful, they do it incorrectly, parallel to top of paper, so it tears when pages are turned.
5. Jog and tap top of papers because paper is not evenly cut.
6. Not 
7. But 
8. 1/4 inch from edge of paper at each end of staple.
9. Show the instructor/supervisor your first one.
10. Redo if it is incorrect.
11. Stack.

1211.02.04 A. If the classroom functions like a simulated production center, teaching students inventory control within the classroom is very easy: students record whatever supplies they use for their "clients" and cost back for each job. Outside clients do not pay for student time, but they do reimburse the classroom for all materials according to carefully kept student records.

B. Even if the classroom is not a simulated production center, the same general methodology could apply. Records can be kept by individual student, by class, etc.

C. Advisory Committees are often excellent sources of supplies. Instructors should not hesitate to make the classrooms' needs known to members who are usually more than glad to help fill the need. This applies to equipment, as well as more general supplies.

Number Instructional Ideas

1211.02.05 General housekeeping ranges from machine maintenance to watering the office plants and even making the coffee. The list whilch follows is brief and simply a starting place for other habits the instructor may wish to cultivate. The most appropriate place to begin teaching/learning this objective is right in the classroom.

SECRETARIAL CLEANING DUTIES

1. Stiff brush
    a. Two types
        (1) S = straight (not ball typewriters)
        (2) T = toothbrush (ball typewriters)
    b. Use only on typeface.
    c. Dig sharply toward you. (If carbon ribbon, not necessary.)
    d. Don't touch, because it is inky.
    e. Replace in storage box.
2. Soft brush
    a. Dust between keys
    b. Dust other parts but not inky or oily places.
    c. Move carriage, but don't get into oil.
    d. Dust under typewriter or machine.
    e. Dust transcriber.
    f. Dust electricial outlets on desk or nearby desk.
    g. Return to storage box.
3. Cloth
    a. Shine chrome.
    b. Dust desk, compartment of desk, and drawer.
    c. Dust chair.
    d. Dust machine covers.
    e. Dust transcriber.
    f. Shake outside door or window.
    g. Fold and return to storage box.
4. Look for items which need to be taken care of.
    a. Torn typewriter covers.
    b. Covers missing.
    c. Stains.
    d. Scratches or worn or broken places on furniture or machines.
    e. Other irregularities.

Number	Instructional Ideas
1211.02.06	Safety and security are both important concepts to emphasize in class. If the Legal Secretary is responsible for locking the office at night and on occasions forgets, that office is especially vulnerable to theft or vandalism. Security considerations are related to Module 1207 on Legal Ethics which stressed personal responsibility. Safety habits is another important area which can be introduced at the same time with preventive care. The same strategies which applied to the previous objective are equally effective here.
1211.03.01	If at the onset the student can complete all the lab jobs in 1211.02.02 satisfactorily, s/he might be considered to have mastered this module and can go on.
1211.04.01	An appropriate posttest would involve the instructor's subjective evaluations of student performance in the following areas: • Regularly cleans the exterior surfaces of the lab equipment, including the keyboard, panel, printer, and screen; • Is able to identify common problems involving both machines and media and their solutions, and apply problem analysis to sample problems; and • Reports the problem to the supervisor immediately and on a proper reporting form if appropriate. Students who do these things effectively and have satisfactorily completed the lab jobs have mastered this module.
1211.05.01	A useful reference for this module is The Lawyer's Secretary, 4th ed., Practicing Law Institute, New York, 1972. In addition, any of the general office practice books such as the one by Archer, Brecker, Frakes, and Stewart are also helpful.

Number	Condition	Performance	Standard
1212.01.01	Given discussions, outside reading, personal interviews, and work experience	the student will recognize entry-level career opportunities	to the instructor's satisfaction.
1212.01.02	Given entry-level career opportunities in the Legal Secretarial field,	the student will develop a salable resume	which includes work and/or classroom experience gained through Legal Secretarial training and which is neatly written, with correct language arts skills.
1212.01.03	Given a series of classroom and/or work experience tasks performed over the instructional cycle,	the student will include all work performed in a student portfolio,	arranged neatly, in good order, and to the satisfaction of the instructor.
1212.01.04	Given personnel willing to interview Legal Secretarial students,	the student will complete an interview	to the satisfaction of the instructor and the interviewee.
1212.01.05	Given the possibility of future employability in the Legal Secretarial field,	the student will perfect professional appearance, poise, attitude, and common sense	to the satisfaction of the instructor and the work experience supervisor.
1212.01.06	Given work experience and/or simulated Legal Secretarial work,	the student will practice effective time management strategies for working under pressure	to the satisfaction of the instructor and the work experience supervisor.
1212.01.07	Given an actual or simulated employee performance review,	the student will complete the review	to the satisfaction of the instructor and the work experience supervisor.
1212.01.08	Given an actual or simulated occasion to leave a job,	the student will complete a job exit	to the satisfaction of the instructor and the work experience supervisor.

Number	Instructional Ideas
1212.02.01	A. Have students contact (visit, write, or telephone) persons employed in the field, consult newspaper ads, and employment counselors regarding available entry-level positions, salaries, and advancement opportunities.
	B. Describe and discuss federal and state wage and hour laws and/or invite the local Labor Commissioner to discuss laws.
	C. Have students investigate sources of information about job openings and report to class.
1212.02.02	A. Describe the purpose, content, and style of a resume. Have students review sample resumes and write their own resumes like the sample which follows. The data organizational sheet is also included.
	B. Have students show in their resumes that they know what the career ladder is by including their own career objectives.
1212.02.03	Each student's portfolio will be developed over the course of the semester, year, etc. The instructor should decide beforehand exactly what should be included. The portfolio will be a valuable device for building self-esteem and for effective interviewing.
1212.02.04	A. Stage an interview day where half the class comes prepared for an interview, and half the class evaluates their performance. An alternative is to invite an "outsider," someone such as an employment counselor, to evaluate performance.
	B. Videotape or tape record students or other faculty conducting simulated job interviews with students. Play back for class discussion and evaluation.
	C. Hold a class discussion or emphasize during interview day or the videotape playbacks the importance of verbal communication. Stress that the interviewer will be checking to see how well-spoken they are. Have them become conscious of and practice effective speech.
	D. Invite an employment agency counselor to discuss the use and importance of letters of application. Ask the guest to bring samples.
	E. Have students review samples and prepare their own letters of application for a job of their choice.
	F. Discuss information which can and cannot be required on job application forms and have students complete sample forms.

Number Instructional Ideas

G. Every year many employers do not hire qualified young people because of their inability to properly complete an application blank or satisfactorily present themselves in a job interview. On April 30, 1975, the Advisory Council for Technical-Vocational Education in Texas completed a statewide survey of employers that provided some thought-provoking data which should be useful to business teachers. Nine leading reasons employers gave for rejecting job applicants after the job interview are listed in rank order below.

1. Little interest or poor reason for wanting a job.
2. Inability of applicant to communicate during job interview.
3. Health record.
4. Immaturity (other than chronological age).
5. Personal appearance.
6. Manners and mannerisms.
7. Personality.
8. Lack of job-related skills.
9. Poorly completed job application form.

RESUME

Jean Laborges*

PERSONAL INFORMATION

Address	1800 Silverado Trail, Napa.
Telephone	224-0473.
Position desired	Legal secretary.
Age	18. Born April 16, 1962, in Napa.
Height and weight	5 feet 2 inches. 98 pounds.
Marital status	Single.

EDUCATION RECORD

Graduate, Napa High School, June 12, 1980.

Classes which especially apply

- Office Production Typing
- Legal Secretarial Practice
- Secretarial Work Experience
- Typing 1, 2
- General Business
- Office Machines
- Shorthand 1, 2
- Psychology

Machines used

- Typewriters
  - Electric: IBM Executive, IBM Standard, IBM Selectric, Royal 970, Royal 660, Royal 550, Royal Electress, Adler, Olympia, Underwood.
  - Manual: Royal 440, Royal Empress, Smith-Corona-Marchant, Remington.
- Adders-Calculators
  - Comptograph Ten-key Adder, NCR Full-bank Adder, Victor Printing Calculator, Monroe Rotary Calculator, Monroe Electronic Calculator, Burroughs Key-driven Calculator, Olivetti Underwood Bookkeeping Machine, Olivetti Divisumma 24 Printing Calculator.
- Duplicators
  - A. B. Dick Stencil Duplicator, Heyer Liquid Duplicator, 3M Dual-spectrum Copier, Gestetner Electrostatic Copier, Gestetner Electrostatis Scanner, A. B. Dick Offset Duplicator.
- Voicescription
  - Dictaphone Visible Belt Transcriber, Dictaphone Magnetic Belt Transcriber, Dictaphone Combination, Stenorette, IBM Transcriber, IBM Combination, Edison Disk Transcriber, Edison Disk Combination, Edison Tape Combination.

*Fictitious name

Miscellaneous
Paper cutter, Stapler, Paper punch.

Honors and awards

Bank of America First Place Zone Winner in Vocational Arts; Nominated for National Association of Legal Secretaries scholarship; Honor Roll; 1969 Crisco Award for oustanding student in Home Economics; 50-hour service award from Community Projects, Inc.; Certificate for 62 w.p.m. in typing; Legal Stenographer rating on Civil Service test; 5-minute Gregg Shorthand Speed Test Award at 60 w.p.m. and 80 w.p.m.; Gregg Shorthand Basic Transcription Production Test award; Gregg Shorthand OGA Penmanship Test award.

Activities

Member of Pep Club, Homemaking Club, Burkart's King and Queen Dance Club, Senior Tea Committee, Spirit Week, Car Rally, Christmas Hall Decorations, Spring Show, Tennis Team, Community Projects, Inc.

EXPERIENCE RECORD

Legal Secretary Trainee, Rutherford & Rutherford, 1754 Second Street, Napa (226-3753).
Legal Secretary Trainee, Napa Police Department, 1539 First Street, Napa (226-3736).
Clerk-Typist, Napa Valley Unified School District, 2425 Jefferson Street, Napa (224-8311).

REFERENCES

Dr. Alice L. Holst, 540 Sunset Drive, Angwin (965-2068).
Captain Sherman Shulte, 1539 First Street, Napa (226-3736).
Mr. Charles Petersen, 2995 Pinewood Drive, Napa (225-3318).
Mr. Gerald Levin, 1048 Delbrook Drive, Napa (226-8097).

Number		Instructional Ideas
1212.02.05	A.	Invite a professional businessman/woman, more than one speaker is helpful, to talk to the class about professional grooming and how it has affected his/her career development. The instructor is also encouraged to remember that what s/he wears to class or how s/he acts is one of the most consistent and important models students will have during pre-employment.
	B.	Discuss principles of speaking and listening for effective oral communications.
	C.	Videotape or tape record students practicing oral communications skills. Play back and discuss manner of speech, tone of voice, attitudes, gestures, etc.
	D.	Invite a local Legal Secretary or attorney to discuss qualities desired of employees.
	E.	With students, prepare a checklist of desirable characteristics of an employee who is dealing with employees or the employer. Discuss the results.
	F.	Discuss the importance of enthusiasm. Role play employer-employee situations showing enthusiasm and willingness to work.
	G.	Have students create a two-minute videotape production demonstrating employee enthusiasm and willingness to work.
	H.	Discuss the meaning of "initiative" and its relationship to "enthusiasm." In discussion, evaluate classroom situations to show how students or groups demonstrate initiative.
	I.	Role-play situations that show initiative and lack of initiative. Discuss results with class.
	J.	Develop an "initiative chart." At the end of each class period, give each student who demonstrated initiative a square on the chart.
	K.	Have students keep accurate records of class assignments. Discuss how failing to complete class assignments related to failing to complete tasks assigned by the employer.
	L.	Students need to be taught or at least encouraged to detach themselves from their work sufficiently to accept criticism objectively. This is best done in the classroom by introducing the concept

Number	Instructional Ideas
	first, then criticizing students' work when necessary and talking with students about their acceptance of this criticism afterwards. This is an important job skill, and it is probably one we do not prepare students well enough to accept or deal with. The more we can do in this area, the better off our students are likely to be.
1212.02.06	Time management is best learned in the actual production situation. However, valuable points can be made through discussion when students have enough of an experiential background to be able to relate the points they hear.
1212.02.07	The instructional strategies suggested for interviewing are equally applicable here. Students should be given opportunities to dialogue about positive and negative performance reviews. Emphasis should be put on what kinds of behavioral changes would have made the review better, if it was negative.
1212.02.08	Too many people do not know how to quit a job: they either disappear from a position too quickly or they leave positions with a negative posture. We should be teaching students how to leave jobs as positively as possible (even when circumstances might warrant otherwise), since statistics indicate that they will be changing jobs many times in the course of their careers.
1212.03.01	Pretest Directions for the Instructor: Give each student a data information sheet like the one which follows and ask them to develop a resume. A satisfactory resume would look like that of "Jean Laborges" in 1212.02.02. Analyze each student's resume carefully and then use it as a career counseling device. If students lack job experience, they should be placed in a legal office for on-the-job experience as soon as possible. In short, students' responses to the pretest will give instructors a very clear idea of students' employability.
1212.04.01	Posttest Directions for the Instructor: Arrange for each student to complete a simulated (or real) job interview with a local employer. Instruct students to take their resumes and portfolios to the interview. In addition, each student will take a copy of an interviewer's rating sheet, such as the sample which follows. Interviewers will assess each student's performance and return the completed form to the instructor for further analysis and discussion with the student about interviewing strengths and weaknesses.

INFORMATION NEEDED FOR RESUME AND APPLICATION

1. Name
2. Address
3. Telephone number
4. Date of birth
5. Citizenship
6. Height
7. Weight
8. Social security number
9. Marital status
10. Residence (living with parents, etc.)
11. Education
    a. Where your high school work has been taken and when
    b. Classes you have had which are pertinent to the job being sought.
    c. Skill achievements.
    d. Academic awards and recognitions.
12. Extracurricular activities and special interests.
    a. Senior class offices and school offices held.
    b. Athletic participation.
    c. Clubs, on campus and off campus, and societies and other organizations to which you belong or have belonged.
    d. Church activities and community activities (volunteer work for Red Cross, etc.).
13. Work experience (give full name of employer, address and telephone number of employer, dates of employment, duties performed)
    a. Secretarial work for pay.
    b. Secretarial work for school credit.
        (1) Secretarial Work Experience offices
        (2) Medical or General Secretarial Practice laboratory (the MWF labs)
    c. Secretarial volunteer work.
    d. Non-secretarial work, paid or unpaid, which demonstrates that you can carry responsibility and have desirable work habits.
14. References. (Follow suggestions below.)
    a. Get permission from those you list.
    b. Give full names, their positions, their addresses, their telephone numbers.
    c. Do not list relatives of yours.
    d. List those for whom you have worked, community leaders, school leaders or teachers, church leaders, etc.

Office:______________________________Date:___________________________________

This student is on an assignment from the ____________________ class. S/He is trying to gain experience and confidence in interviewing for a job.

Would you please take a few minutes to complete the following upon termination of the interview? Thank you.

Student's Name: ____

Did s/he call to set up an appointment?
Comment: ____

Was his/her attire and appearance appropriate?
Comment: ____

Did s/he introduce her/himself?
Comment: ____

Did s/he terminate the interview satisfactorily?
Comment: ____
____

What was your general impression of the student?
Comment: ____
____
____

How do you feel the interview went?
Comment: ____

What suggestions do you have for improvement?
Comment: ____
____
____

Would you hire this student:
Comment: ____

____
Signature and Title

Thank you very much for your time and effort. It is greatly appreciated by both my students and myself.

Instructor's Name
Program Name
Address
Phone Number

Number	Instructional Ideas
1212.05.01	American Manpower Today. U.S. Department of Labor, Washington, D.C.: 1974.
	Bellotto, Sam, Jr. "Male Temps: Clerks to Controllers." Administrative Management, March, 1971, pp. 54-55, 79-80.
	Facing Facts About Vocational Education In Your Career. The Prudential Insurance Company of America, Newark, N.J.: 1975.
	Getting the Right Job. SCM Glidden-Durkee, Cleveland, 1973.
	Jobs For Which a College Education Is Usually Required Bureau of Labor Statistics, Washington, D.C., 1973.
	Meisner, Dwayne. "The New Economics of Temporary Personnel." Administrative Management, May, 1974, pp.20-21.
	Merchandising Your Job Talents. Manpower Administration, Washington, D.C.: 1974.
	National Survey of Professional, Administrative, Technical, and Clerical Pay. Bureau of Labor Statistics, Washington, D.C.: 1975.
	A New Approach To Manpower. Manpower Administration, Washington, D.C.: 1974.
	Occupational Outlook Handbook. U.S. Department of Labor, Washington, D.C.: 1976.
	"Occupational Outlook For The Mid-1980's." Occupational Outlook Quarterly, Winter, 1975.
	Prigge, Lila L. "Specialized Programs in Office Occupations." Journal of Business Education, April, 1976, pp. 211-213.
	Renee, M. Anne. "What Business Wants From Beginners." Administrative Management Society Report, May, 1974, pp. 55-57.
	Short, Larry E. "Nondiscrimination Policies: Are They Effective?" Personnel Journal, September, 1973, pp. 786-792.

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Stutsman, Galen. "Survey Stresses Need for Filing Instruction." The Journal of Business Education, March, 1974, p. 263.

A Working Woman's Guide To Her Job Rights. U.S. Department of Labor, Women's Bureau, Washington, D.C.: 1975.

1212.05.02 BOOKS WITH SUGGESTIONS FOR INTERVIEWS AND APPLICATION LETTERS

Meehan, James R., Mary Ellen Oliverio, and William Pasewark. Secretarial Office Practice, 8th ed. Cincinnati: South-Western Publishing Company, 1972.

Gregg, John Robert, et al. Applied Secretarial Practice, 7th ed. New York: McGraw-Hill Book Company, 1974.

Hanna, Marshall, Estelle L. Popham, and Rita Tilton. Secretarial Procedures And Administration, 6th ed. Cincinnati: South-Western Publishing Company, 1973.

Murphy, Herta A., and Charles E. Peck. Effective Business Communication, New York: McGraw-Hill Book Company, 1972.

New York State Department of Labor. Guide to Preparing a Resume. New York: New York State Employment Service, 1972.

Wolf, Morris Philip, and Robert R. Aurner. Effective Communication in Business, 6th ed. Cincinnati: South-Western Publishing Company, 1974.

Number	Condition	Performance	Standard
1213.01.01	Given discussion of the Legal Secretarial field,	the student will identify career paths in the field using current information	to the satisfaction of the instructor on a criterion-reference test.
1213.01.02	Given discussion of the work involved in the Legal Secretarial field,	the student will identify career possibilities in related fields,	to the satisfaction of the instructor.

Number Instructional Ideas

1213.02.01 A. Develop a student follow-up system maintained by the students themselves. The following procedure has been used successfully:

1) Have each student fill out the Legal Secretarial Training Student Follow-Up Form on the next page. This is the record used for further contact.
2) Have current students mail the Student Follow-Up Report Form to the instructor the following October 1. (Adjust the timing to suit the course.)
3) Have current students analyze the results for indications of the training's success and any modifications to training needed.
4) Have students file follow-up results in former students' files for future reference.
5) Complete an annual follow-up on all students. Use the information for job placement referrals if employers contact the instructor for possible employment.
6) Current students, in effect, will be placing former students and learning about the Legal Secretarial job market in the process.

This strategy not only gives students further organizational filing practice, but allows them to follow the career paths of former students in preparation for their own employment. They can also contact students to ask them if they are interested in certain positions.

LEGAL SECRETARIAL TRAINING STUDENT FOLLOW-UP FORM, (Name of School) YEAR ____

Married Name (Teacher fills in later)

Wife's or Husband's First Name

Unmarried Name (if applicable)

Given Name

Address: Name and street; post office box; city; state; zip code number

Telephone	Age	Shorthand Speed	Typing Speed	Letter Grade 1st Sem.	Letter Grade 2nd Sem.	Absences 1st Sem.	Absences 2nd Sem.

Goal ____

Students's Goal ____

Comments by instructor ____

Date Followed Up	Additional Information

STUDENT FOLLOW-UP REPORT

YOUR NAME ______________________________

Name of Company ______________________________

Address of Company ______________________________

Name of Supervisor ____________________ Company telephone __________

Date began ____________________ Date ended ____________________
Month-Day-Year Month-Day-Year

Aver. number hrs. per week ________ Pay received $ ________ per ________

Title of your position ______________________________

Duties performed ______________________________

____

____

Comments ______________________________

____

____

Name of Company ______________________________

Address of Company ______________________________

Name of Supervisor ____________________ Company telephone __________

Date began ____________________ Date ended ____________________
Month-Day-Year Month-Day-Year

Aver. number hrs. per week ________ Pay received $ ________ per ________

Title of your position ______________________________

Duties performed ______________________________

____

____

Comments ______________________________

____

____

Number **Instructional Ideas**

B. Many Legal Secretaries prefer to work in a one-person office. Here they get broad, specific experience in all daily office routines and have such a wide variation of duties that the work seldom becomes monotonous. The one employee handles both incoming and outgoing mail, files, handles cash, makes long distance calls, purchases supplies, makes reports, and acts as receptionist. The principal disadvantage of working in the one-person office is that there is no room for advancement. The Legal Secretary probably receives a salary limited by the amount the small office can afford to pay, and, even though the employee's effectiveness may increase, positions do not exist for promotion. Such salary increases as are given are at the whim of the employer.

The Legal Secretary in the large office works with lots of other people; the type of person who enjoys being with a group will be happiest in this environment. In a large office, the Legal Secretary need not have such a wide knowledge of all office routines as the one in the small office needs. For instance, in large offices, the switchboard operator handles some of the telephone duties; the mailroom performs the postal and shipping chores, the purchasing department buys the supplies. Salaries in large companies are often higher than they are in small ones. Increases usually are based on the ability of the worker to produce, and it is possible for a worker with ability to move up into a new job and classification on the basis of merit ratings.

A job in a small town will probably pay less than one in the city. However, living expenses will also be lower; and some people are happier in small towns than in cities.

The large offices of stores and banks, government agencies, utilities, and similar corporations usually are found in the downtown district. The executive offices of the large corporation also usually occupy a downtown location. In these offices the pace is brisk, the atmosphere sophisticated. The offices usually are supervised by an office manager, and the centralized service units are operated by trained supervisors.

The metropolitan atmosphere makes shopping and entertainment facilities so readily accessible that the workers spend more money than in more isolated surroundings. Also, the employee in the heart of the city spends more for clothing than the worker in the suburban area.

Most of the employees use public transportaion to the downtown office because of traffic congestion and high parking costs. The Legal Secretary who lives away from home will find living expenses so high that a salary that looked more than adequate will require careful stretching.

Number	Instructional Ideas
	C. Rather than try to abstract the article on the following page, it is included in its entirety. It is an important article for the concept of career development
1213.02.02	A. According to Joy Helper of Mark Associates, who has had 15 years of experience in career counseling, this area is one of the best entry-levels for advancement, both within the legal field and into other fields. If a student has the typing skills to start with, s/he can expect an initial monthly salary between $900 and $1100. Then, with experience, salaries rise, with the opportunity of bonuses, as well as profit-sharing in most firms. Entry-level positions in the legal profession are either clerical, secretarial or as word processing trainees. High school graduates, both men and women, are welcome in entry-level positions, although college training is customary for those going on into paralegal work. There are many opportunities for advancement from these entry-level jobs. Within the legal office one can move into personnel, paralegal, supervisorial or administrative positions. In addition, many non-legal firms actively recruit people with prior legal office experience because of the excellent training and knowledge required.
	B. In late 1971, personnel directors were asked to complete a one-page questionnaire rating 20 employee traits related to competencies, attitudes, skills, and personality. The directors were asked to indicate those traits which were most often in need of improvement or retraining for entry-level and mid-management employees. This study may have relevance for young people about to enter the job market or for those seeking promotion. Students often express skepticism when instructors attempt to describe the various job environments in realistic terms. This study may reinforce textbook descriptions of selection and promotion criteria used by management personnel in evaluating entry-level and mid-management employees.

THE LEGAL ASSISTANT—
THE TIME HAS COME

Alberta J. Frerichs
University of Washington
Seattle, Washington

"Educational program for legal paraprofessional jobs are available throughout the country."

"There is nothing more compelling than an idea whose time has come," said a legal assistant to a group of lawyers in Washington State recently. She was referring to the idea of using legal assistants in the practice of law. Are business educators and guidance counselors aware of this new group of paraprofessional workers?

One attorney explained the use of the legal assistant in the law office as ". . . the involvement of the non-lawyer in the practice of law under the supervision of an attorney in order to bring the costs down and to free the lawyer to do legal business."

Although the American Bar Association (ABA) prefers the title legal assistant, other titles are used sometimes, including paralegal, sublegal, legal adjoint, legal aide, legal technician, office administrator, and staff specialist.

In most cases legal assistants specialize in one or two fields of law. Representative law fields are domestic relations, corporations, probate, litigation, bankruptcy, real estate, and insurance.

Using legal assistants lowers some legal fees. In one firm a legal assistant's time is billed at 3/7 the cost of a lawyer's time.

Annual salaries of legal assistants in the Pacific Northwest range from $7,500 to over $14,000 depending on the nature of the job, the type of law office, and the abilities and proficiency of the legal assistant.

Duties

The use of paraprofessionals needs explaining to most clients. The legal assistant does *not* practice law. He does not give legal advice nor appear in court although some lawyers believe limited court appearances on routine legal matters may be authorized in the future.

A legal assistant's duties include legal research of various types, interviews with clients, the working out of budget needs and resources, the routine preparation and processing of legal documents, and the reviewing of legal publications to prepare suggested reading lists for the lawyers.

An ABA publication states:

. . . . Under the supervision and direction of the lawyer, the legal assistant is trained to provide the following services:

1. Apply knowledge of law and legal procedures in rendering direct assistance to lawyers engaged in legal research.

2. Design, develop or plan modifications of new procedures, techniques, services, processes or applications.

3. Prepare or interpret legal documents, or write detailed procedures for engaging in the practice in certain fields of law.

4. Select, compile, and use technical information from such references as digests, encyclopedias or practice manuals.

5. Analyze and follow procedural problems that involve independent decisions.[1]

Although it would be setting a new precedent, it is reported that "The Supreme Court of the State of Washington has indicated that the Judicial Council is formulating rules for the use of legal assistants . . . "[2]

Working Relationships Within The Office

Resistance to employing legal assistants in law offices comes mostly from fear of the unknown. There are few examples to follow when setting up job specifications for this new type of employee. A few legal secretaries with enough knowledge and experience to be legal assistants have found that the role is not to their liking. They prefer to remain highly paid secretaries but their duties include many legal assistant tasks.

The legal assistant is a member of the office team; but, unlike the usual close one-to-one employer-employee relationship in which the secretary often works, the legal assistant operates in a more independent situation, delegates his secretarial and clerical work, and is much more aggressive in carrying out job assignments.

Upgrading a legal secretary to a legal assistant is cause for concern in some law offices. A law firm may provide financial aid for special classes so an interested secretary can become a legal assistant only to find that when it is time for the upgrading of the employee, the employers and other employees have difficulty adjusting to the former secretary's change of job duties and status.

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[1] "Proposed Curriculum for Training of Law Office Personnel," ABA Special Committee on Legal Assistants, April, 1971, p. 13. (ABA, 1155 East 60 Street, Chicago, IL 60637)

[2] Georgia Hinton, "Legal Assistants," WALS State Journal, Vol. VII, No. 1, August, 1972.

Up to the present time most changes have been made by the secretary leaving his job as a legal secretary, doing free-lance work for a short period of time, and then hiring into a different legal office as a legal assistant. It is hoped that the change from legal secretary to legal assistant within an office soon will become a smooth operation.

For the lawyer, getting work done through other people is a valuable talent and aid. Carefully selected paraprofessionals help to hold the work of the professionals in the office at a high level. Also, since attorneys usually must give sparingly of their time, clients like the personal attention a legal assistant is able to give.

Education and Training

In the Seattle, Washington, area the greatest impetus for educating and employing legal assistants in law offices has come from a small group within the Greater Seattle Legal Secretaries Association, some educators in a suburban community college, and a few attorneys.

In the fall of 1972, a two-year daytime associate degree program for legal assistants and an evening program offering special courses to aid legal secretaries to become legal assistants began at Edmonds Community College. A student is expected to become knowledgeable and competent to work as a legal assistant in two areas of law; i.e., litigation and probate, or any other combination. An advisory committee of legal secretaries, educators, and lawyers meets once a month to discuss course offerings, publicity, financing, certification, placement services, seeking and recommending available attorneys to instruct the classes and to develop teaching materials, etc. The advisory committee is chaired by the office manager of a large law firm.

Educational programs for legal paraprofessional jobs are available throughout the country. Several community colleges offer two-year programs as well as evening classes. A Midwestern state university offers its four-year liberal arts students a variety of law courses for legal paraprofessional preparation, and a private school in the East offers college graduates a three-month session of paralegal training.

Career Ladder

The ABA Special Committee on Legal Assistants is working toward a "three-step career ladder" for nonlawyer personnel—legal secretary, legal assistant, and legal administrator.

For the most part, the recommended educational courses for the positions on the three steps of the career ladder build on one another. The ABA Committee recommends that the three programs be given in accredited institutions, that ABA standards be met, and that the legal courses be taught by attorneys. Degrees or certificates are given by the participating colleges, although some persons hope eventually the ABA and the state bar associations will sponsor certifying examinations.

The ABA Committee recommends provisional certification for the legal assistant upon the completion of the Committee's recommended two-year course with full certification after one year of employment as a legal assistant. In 1971 Austin Anderson of the ABA Committee suggested that courses for legal assistants cover "(1) law systems and courts; (2) ethical and professional practice problems; (3) law library and legal research; (4) acquaintance with standard forms; (5) accounting; (6) office procedures." He mentioned also the ability to communicate through speaking and listening and the use of proper grammar, punctuation, and spelling in written communication.

The state bar associations and the schools offering legal paraprofessional courses are finding it necessary to get together on setting up placement services for the students. It is important for students under these circumstances to attend ABA accredited schools.

National Organization for Legal Assistants

In January, 1973, the National Association of Legal Secretaries (NALS) opened a special Section for Legal Assistants. This group is the first nationwide organization for legal paraprofessionals. Until official standards for being a legal assistant are set by the American Bar Association, the NALS Section will grant membership to a person who has completed an approved training course for legal assistants or to a person with six months or more of legal assistant experience which has been certified by his employer.

Despite the present growing pains, paraprofessional positions in the legal office are here and here to stay. Teachers and counselors are well-advised to take note of this new group of workers and to inform students about these new vocational possibilities. For the legal assistant—the time has come!

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*"A Wide Open Future," The NALS Docket, August-September, 1971, p. 15.

AREAS IN WHICH IMPROVEMENT NEEDED	ALL RESPONDENTS (38)		RETAILER RESPONDENTS (20)		COMMERCIAL AND SERVICE ORGANIZATION RESPONDENTS* (18)	
Trait	Rank	Response Frequency	Rank	Response Frequency	Rank	Response Frequency
Oral Communication	1	25	4	11	1	14
Initiative	1	25	1	15	2	10
Reliability	2	22	2	13	3	9
Written Communication	3	21	8	7	1	14
Attitudes	3	21	3	12	3	9
Interest in Work	4	18	6	9	3	9
Industriousness	5	17	5	10	4	7
Accuracy	6	16	5	10	5	6
Courtesy	7	15	7	8	4	7
Punctuality	7	15	6	9	5	6
Efficiency	8	14	8	7	4	7
Sales Ability	9	13	5	10	8	3
Business Math	10	12	7	8	7	4
Reaction to Authority	11	11	8	7	7	4
Reading Comprehension	11	11	11	4	4	7
Tact	11	11	9	6	6	5
Cooperativeness	11	11	7	8	8	3
Legible Handwriting	12	10	10	5	6	5
Honesty	12	10	8	7	8	3
Neatness of Dress	13	9	10	5	7	4
Grooming	13	9	10	5	7	4
Self-confidence	14	8	10	5	8	3
Record Keeping	15	6	11	4	9	2
Filing	16	3	12	1	9	2

*Includes hospitals, banks, airlines, insurance firms, and data processors.

Number	Instructional Ideas
1213.03.01	Instruct students to write a paper on the career possibilities for Legal Secretaries. If students cannot respond satisfactorily, assign the task as a research project and posttest. This has the added advantage of touching on the development of several other skills already suggested in previous modules.
1213.04.01	Have students read case studies of individuals who have advanced in the field, interview Legal Secretaries and others, or listen to a guest speaker on the topic. The important point for them to realize and demonstrate in their papers is that different kinds of skills are usually needed for advancement. They may need to have budget skills, personal presentation skills, or knowledge of specific corporate or business organizations, for example.
1213.05.01	The materials suggested in 1212.05.01 will also be helpful here.

Appendix A

The Legal Secretarial Program for Napa Unified School District is planned to PREPARE YOU FOR BEGINNING SECRETARIAL JOBS in law and in legally-related offices, such as offices of

- Private attorneys
- Corporate legal departments of business firms, banks, insurance companies, and financial institutions
- City, state, and federal executive or administrative legal departments
- Courts, police departments and other law enforcement agencies
- Legal assistance agencies
- Law schools
- Law enforcement institutions
- Law firms

The Legal Secretarial Program also PROVIDES AN EXCELLENT BACKGROUND FOR THE FOLLOWING FIELDS, besides legal secretary:

- Court reporter
- Legal insurance secretary
- Legal stenographer
- Legal typist
- Legal secretarial practice teacher

MOST IMPORTANT OF ALL--THE LEGAL SECRETARIAL PROGRAM PROVIDES FOR YOU AN OPPORTUNITY TO SERVE, TO MAKE A WORTHWHILE CONTRIBUTION IN AN IMPORTANT AND VALUABLE FIELD.

Appendix A

LEGAL SECRETARIAL PRACTICE CLASS AND LABORATORY

Course Plan: The class meets every day. Two days a week are devoted to group learning activities, discussion, and legal terminology. Three days a week are spent in laboratory using transcription machines, other office equipment,and doing secretarial work.

Class Activities: Assignments include study of the work of the legal secretary, such as professional relations with employers and clients, sources of information, record keeping for the law office, office design and layout, office equipment and supplies, use of the telephone, fees and billing, etiquette and ethics, written communications, law offfice filing, civil procedure, domestic relations, probate court procedures, corporation procedure, federal procedure, administrative procedure, criminial procedure, appellate procedure, research, library use, rules for the preparation of legal instruments. Class activities include discussions, recitations, drills, exercises, tests, demonstrations, field trips, and audio-visual aids. Job finding and job sucess receive attention.

Legal Terminology: The language of law is learned in two ways, mainly. The class work studies include the most-used legal terms which a legal secretary needs to know. The student also transcribes many types of legal dictation in the voicescription laboratories.

Legal Transcription: During the year every student practices on nine different kinds of transcribing machines--Dictaphone Magnetic Transcriber, Dictaphone Visible Transcriber, Dictaphone Combination, Stenorette, IBM Transcriber, IBM Combination, Edison Disk Transcriber, Edison Disk Combination, Edison Tape Combination, Stenocord, and Norelco. The student also becomes familiar with the following typewriters: IBM Executive Electric, IBM Standard Electric, IBM Selectric Electric, Royal 970 Electric, Royal 660 Electric, Royal 550 Electric, Royal Electress Electric, Adler Electric, Olympia Electric, Underwood Electric, Olivetti Electric, Royal 470 Manual, Royal 440 Manual, Royal Empress Manual, Olivetti Manual, and Adler Manual.

General Laboratory: General laboratory work includes experience with the stencil duplicator, the liquid duplicator, the 3M copies, the ten-key adding machine, the full-bank adding machine, the printing calculator, the rotary calculator, the key-driven calculator, the electronic calculator, and filing. In addition, students gain experience with various office supplies, supervise other secretaries, practice periphery skills, and learn to use miscellaneous office machines.

Secretarial Office Experience: If possible, you should enroll for the course Secretarial Office Experience, as well as Legal Secretarial Practice. It meets sixth and seventh period every day and provides actual experience in legal office in the Napa area. Each year something like 2/3 of the Secretarial Office Experience class members are offered paid jobs (See attached sheets for description of the course and an application blank.)

LEGAL SECRETARIAL PRACTICE APPLICATION
(Detach this sheet, fill it out, and return it to Room 6.)

____
Last Name   First Name

Best typing speed made on a 5-minute test, with not more than 3 errors?_____

Taking Typing 2 this year_____; this summer_____; next year_____? Your mark in Shorthand 1 at the end of the first semester?_____ If it was below C, do you have reason to believe you can raise it by the end of the year?_____ Taking Shorthand 2 next year?_____ Taking Office Machines this year_____; this summer_____; next year_____? Taking Business English this year_____; this summer_____; next year_____; Your average English marks in grades 9, 10, 11?_____ Be a senior next year?_____ Planing to graduate in January? Yes_____; No_____; Not sure_____. Your mark on the spelling test (to be filled in by Miss Holst)._____ Name of English teacher this year._______________ Are you applying for Secretarial Office Experience, also? Yes_____; No_____; Not sure_____. Are you taking Business Law this year?_____; this summer_____; Next year_____?

List any business courses you have had or are taking besides shorthand, typing, Office Machines, and Business English.

____

____

____

List any business courses you plan to take this summer besides those mentioned above.

____

List any business courses you plan to take next year besides those mentioned above.

____

Tell why you wish to enroll in Legal Secretarial Practice. Use all of the space below. (Make this a typical sample of your handwriting.)

____

____

Appendix A

TENTH ANNUAL LEGAL SECRETARIAL TRAINING REPORT
NAPA VALLEY UNIFIED SCHOOL DISTRICT, VINTAGE HIGH SCHOOL
Alice L. Holst, Ed. D., Instructor
June 1, 1978

and your

CONFIDENTIAL RANKING OF GRADUATES

Thank you again--for the tenth time

for the opportunities you have given the students in the secretarial practice program to secure actual experience in your offices all over the city. There are now more than one hundred offices which cooperate with us in providing work stations for the medical, legal, and general trainees. For each of these privileges we are grateful because you offer a realism that the classroom cannot duplicate.

The students have been surprised and pleased

when you have complimented them on their work. And, of course, they have reported with great pleasure the gifts of candy, flowers, cards, and even money with which you have delighted them. Most of the trainees really do try hard, and their confidence in themselves is strengthened by your expressions of approval.

It has been particularly gratifying

to all of us to note that you have hired many of this years's students, as well as previous graduates, for pay. Some positions are part time, but a large number of them are full time. In fact, we note that some of our students have been working for you since the first class finished this program twelve years ago. We are glad they have performed satisfactorily and, we hope, have become valued employees.

This annual report is sent for your convenience

in reaching students who are better qualified than most high school graduates to give satisfaction as beginning office workers. Some of them already have jobs, but we list them in case their plans should change and they should become available. If you have received previous yearly reports, they should provide you with names of girls who graduated one or more years ago and would, therefore,be a little older and probably more experienced.

Attached to the back of this report

you will find a questionnaire. It will be a favor to us if you will fill it out and return it as soon as possible. These responses guide us in placing trainees in the fall.

Appendix A

These 1978 graduates are RANKED BY THEIR PERFORMANCE IN THE CLASS AND IN THE LABORATORY, FROM BEST TO POOREST. However, it should be noted that even the lowest in this group could compete successfully with the average high school senior. For additional information, feel free to call the instructor, Dr. Alice L. Holst.

	Student	Address	Phone Number
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
.	.	.	.
.	.	.	.
.	.	.	.

When you are looking for permanent or temporary above-average office help, call Dr. Alice L. Holst, Legal Secretarial Practice Instructor, Vintage High School. Call 252-5209 during the day, and ask for Dr. Holst. Evenings call St. Helena 965-2068.

The students on the list may be called directly at any time, of course, if you do not wish the assistance of the instructor.

Types of office workers available: (1) paid full-time workers, (2) paid part-time workers, (3) unpaid secretarial work experience trainees, (4) unpaid volunteers.

PLEASE FILL OUT AND RETURN TO DR. ALICE L. HOLST, VINTAGE HIGH SCHOOL, 1375 TROWER AVENUE, NAPA.

In view of the large number of seniors who have requested Legal Secretarial Office Experience for next year, and the consequent need for training stations, I would be willing to have a Legal Secretarial Practice student train in my office for 65 hours during the school quarters as check below.

	Yes	Possibly	No
First Quarter (Sept. to Nov.)	___	___	___
Second Quarter (Nov. to Jan.)	___	___	___
Third Quarter (Jan. to Apr.)	___	___	___
Fourth Quarter (Apr. to Jun.)	___	___	___

Comment ____

____

Suggestions to us ____

____

Name of firm or employer ____

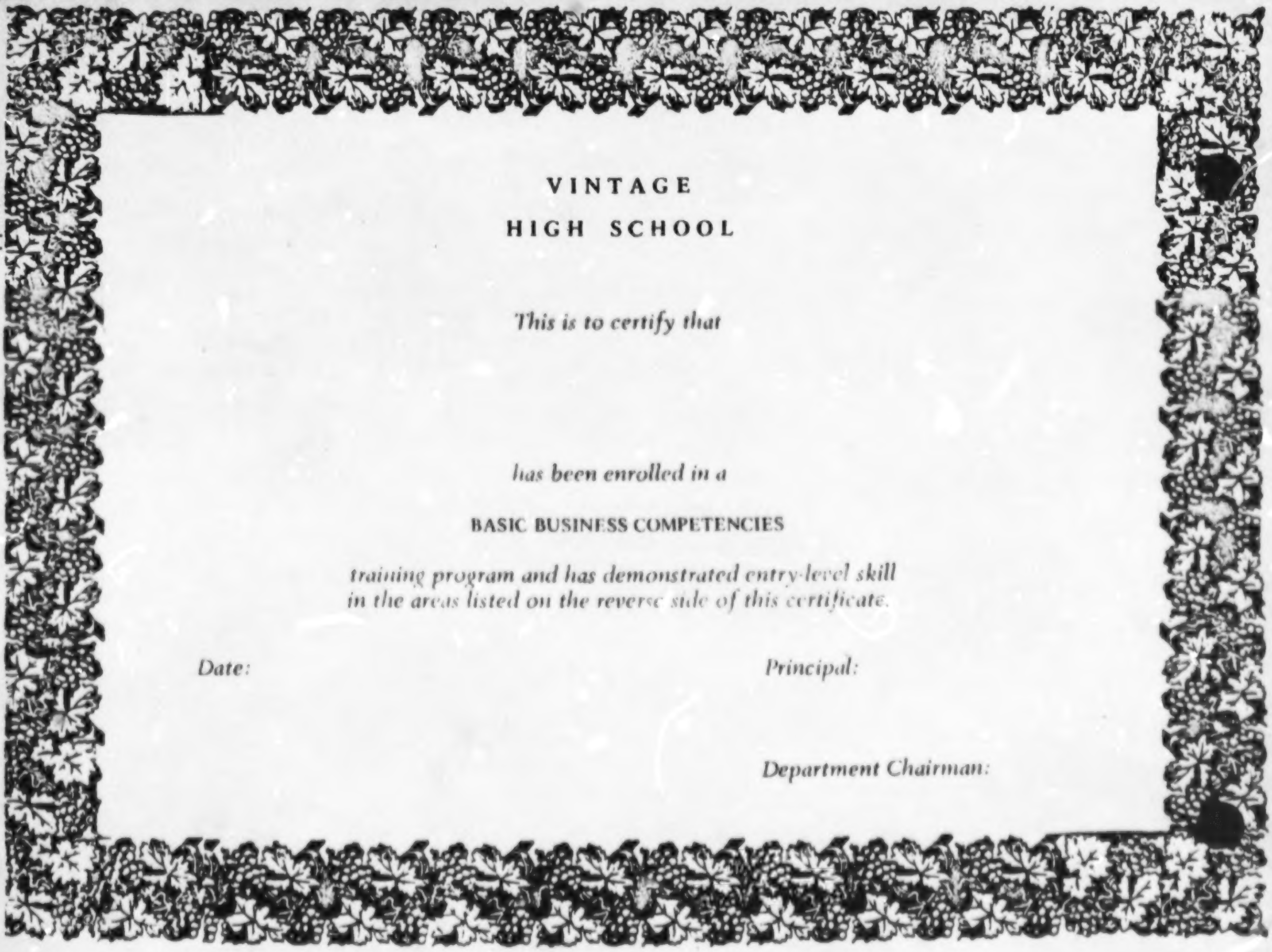
Address of firm or employer ____

Telephone number ____

Signature ____

When you are looking for above-average office help, call Dr. Holst, the Secretarial Practice Instructor, at Vintage High School (224-8311, Ext. 381.)

Appendix B



VINTAGE
HIGH SCHOOL

This is to certify that

has been enrolled in a

BASIC BUSINESS COMPETENCIES

training program and has demonstrated entry-level skill in the areas listed on the reverse side of this certificate.

Date:

Principal:

Department Chairman:

____ 10-key adding machine
____ Grooming
____ Following instructions
____ Math computations
____ Oral communications
____ References, manuals, directories, catalogs, etc.
____ Simple business records
____ Sorting, checking, and verifying
____ Spelling

____ Using the telephone
____ Working with people
____ Written communications
____ Dictation
____ Transcription
____ Typing Speed/Accuracy
____ Legal Forms
____ Legal Documents
____ Legal Terminology